



China: An Existential Threat to the Global Order



CHINA



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The Moore Group LLC
26 August, 2021



Key Questions

- What is China's (CCP) Strategic Intent - Really?
- What Indicators exist and what Patterns are forming?
- How does China's Mindset differ from the U.S. and its Allies?
- What are the Risks to the existing Global Order?
- What can be Done to Shape the Strategic Context?
- What are the Future Scenarios that Could Play Out?
 - Worst Case?
 - Middle of the Road?
 - Best Case?
- What Does it Mean and *What Should We Be Doing?*

Bottom Line

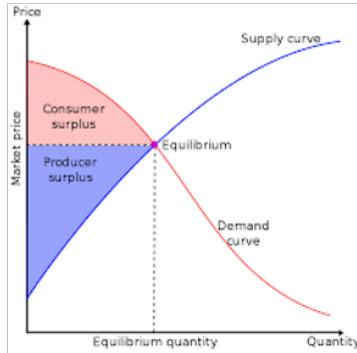
How Are We Going to Successfully Compete?



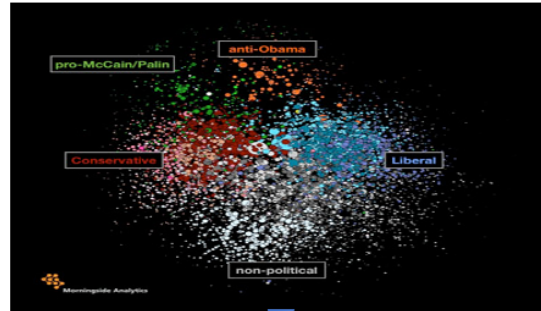
Take a Holistic Strategic View

Consider the Past, Present and Future

Economic



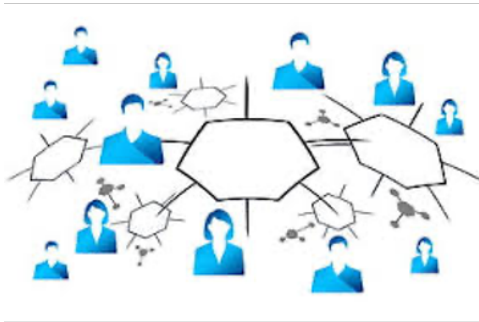
Political



Technology



Social



Environmental

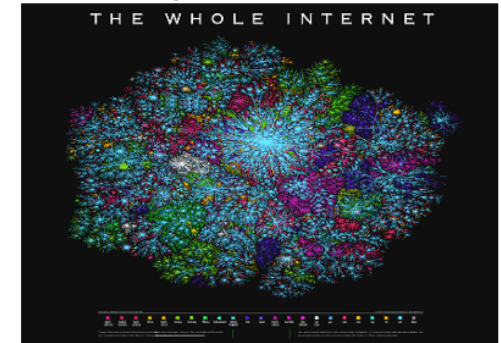


Sense & Anticipate



Syn Ethical Meaning Making

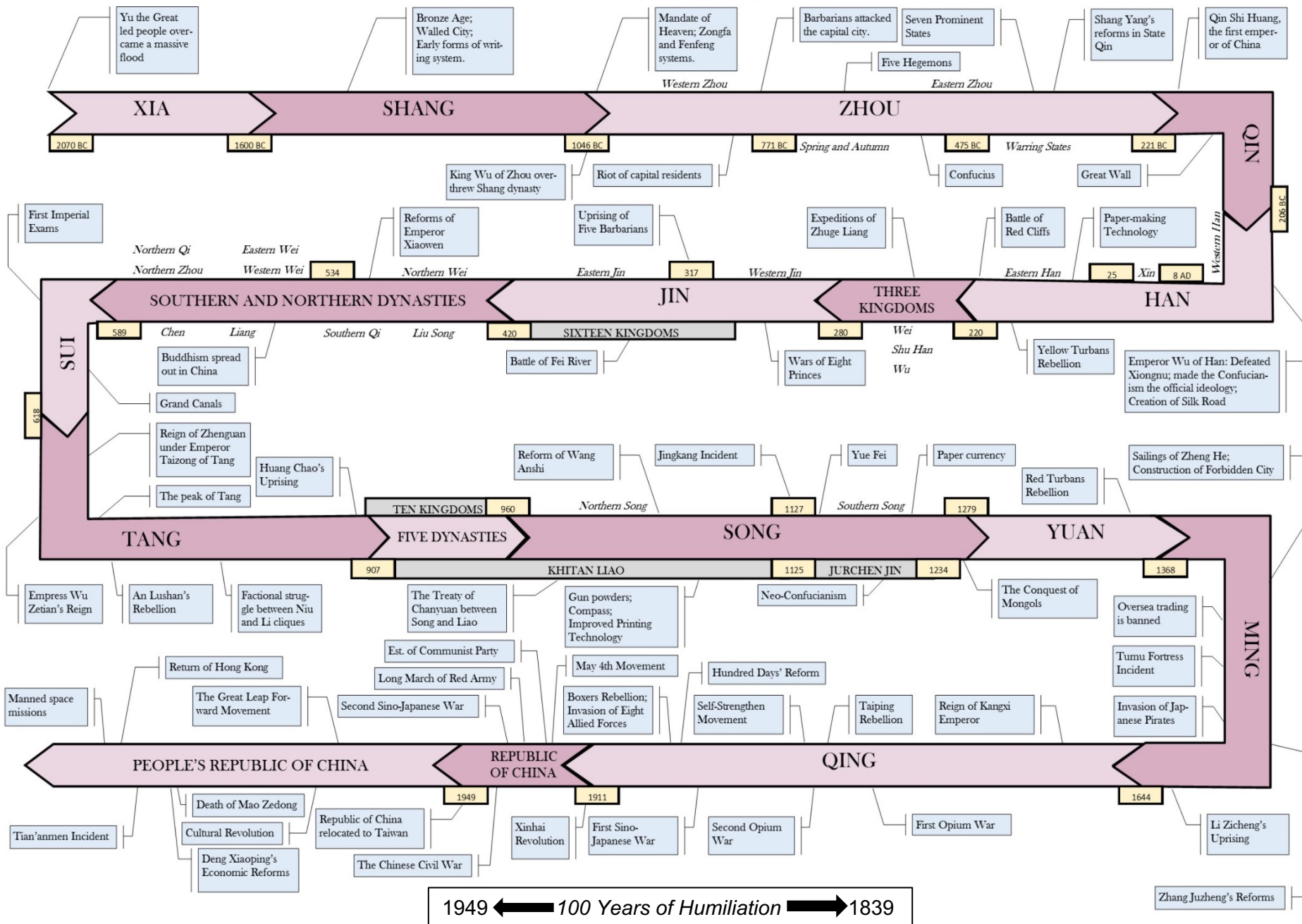
Operational



Legal



TIMELINE OF CHINESE HISTORY



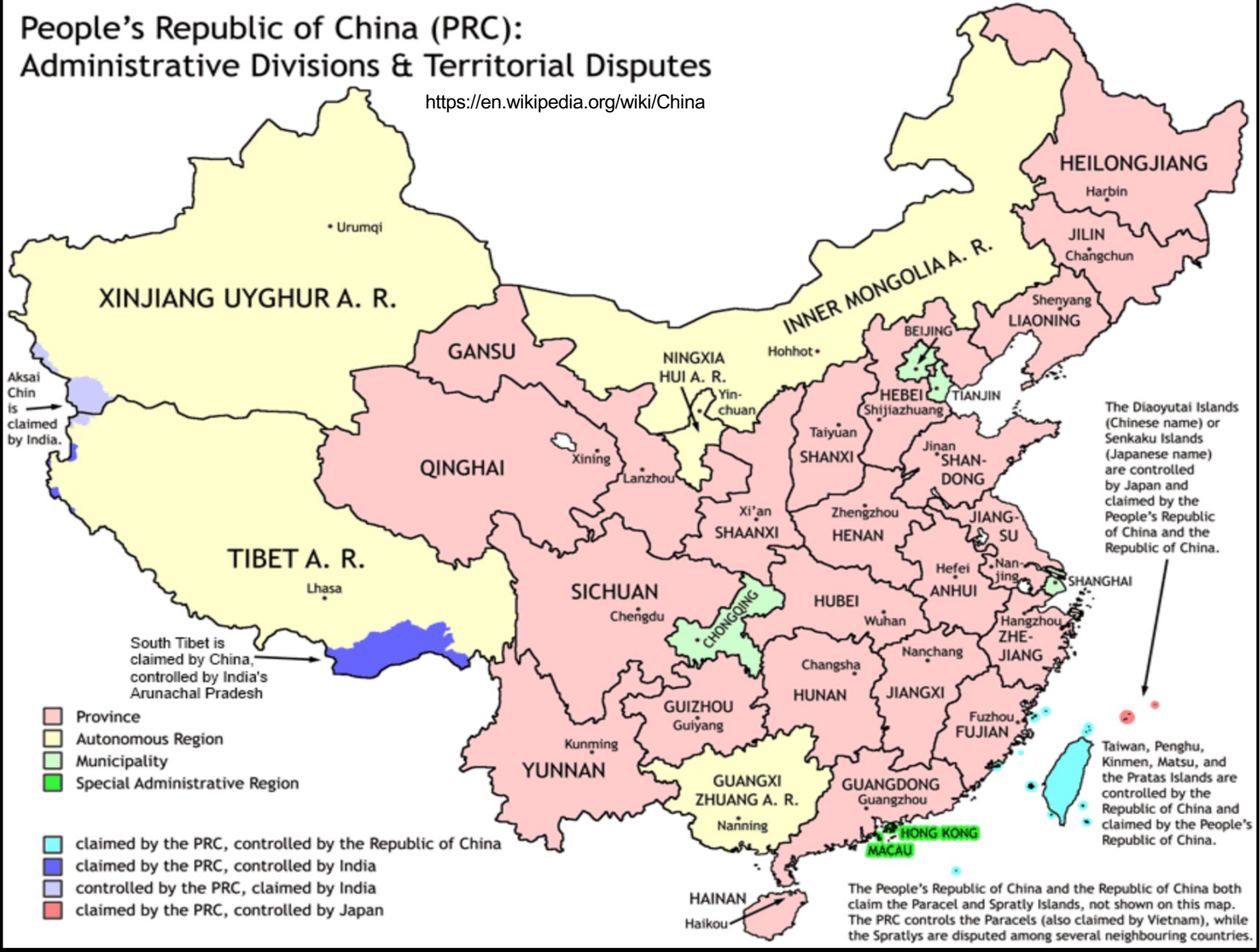


<https://en.wikipedia.org/wiki/China>

NAMES AND BOUNDARY REPRESENTATION ARE NOT NECESSARILY AUTHORITY

People's Republic of China (PRC): Administrative Divisions & Territorial Disputes

<https://en.wikipedia.org/wiki/China>





Posted by u/corymuzi 6 months ago

6 GDP per capita in China, 2020

GDP per Capita in China, 2020

by corymuzi@reddit.com



37 Comments

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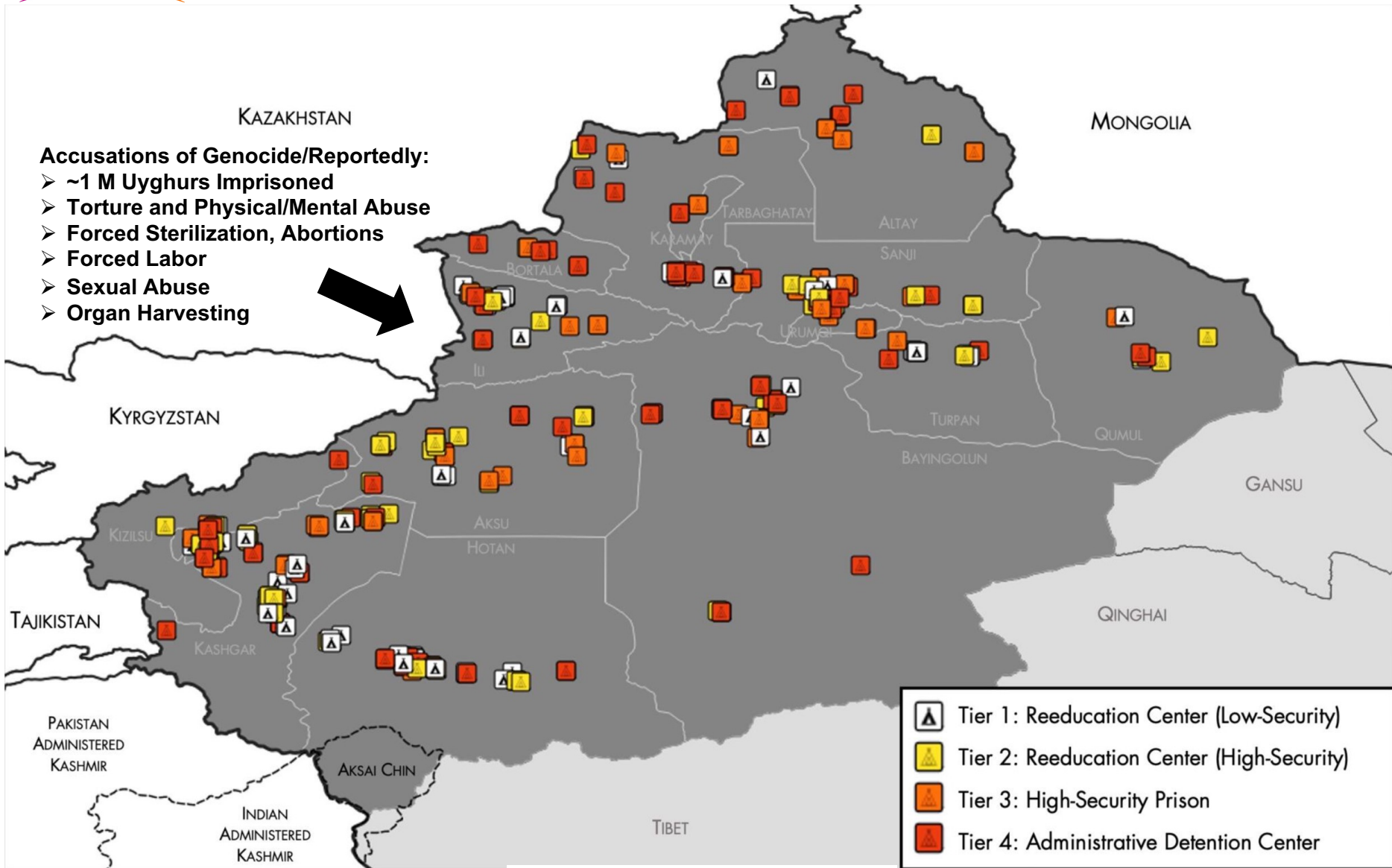
56% Upvoted



Uyghur Detention/“Re-Education” Centers in Xinjiang

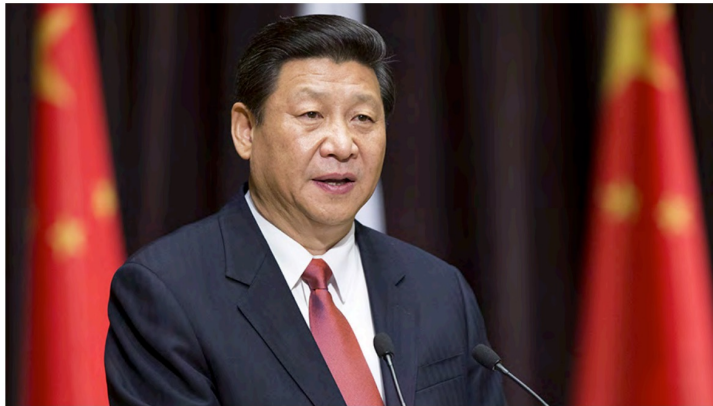
Accusations of Genocide/Reportedly:

- ~1 M Uyghurs Imprisoned
- Torture and Physical/Mental Abuse
- Forced Sterilization, Abortions
- Forced Labor
- Sexual Abuse
- Organ Harvesting





President Xi Jinping



Xi Jinping, CCP General Secretary, President and Central Military Commission Chairman.

Image Source: Shutterstock

"Document No. 9" (2012) is a confidential internal document that warns of **seven dangerous Western values**:

1. Constitutional democracy, which includes such tenets as multi-party systems, the separation of powers, general elections, and judicial independence.^[107]
2. Universal values, a notion contrary to Maoist doctrine, whereby the Western value system transcends nation in class, and applies to China.^{[108][109]}
3. Civil society, the notion that individual rights are paramount, rather than the collective rights established by the Party;
4. Pro-market neoliberalism, referring to libertarian economic values and globalization.^[110]
5. Media independence, as Xi was especially hostile to Western ideas of journalism and the notion of a press that could criticize government and Party policies^{[111][better source needed]}
6. Historical nihilism, meaning the criticism of past errors; and
7. Questioning the nature of Chinese style socialism.^[112]

https://en.wikipedia.org/wiki/Xi_Jinping

- Born 15 June, 1953
- Many Trials & Tribulations Growing Up
 - Family - Poverty, Political Persecution
 - Father – Party Propaganda Chief, Imprisoned
 - Studied Chemical Engineering and Law
- PRC President since 2013
 - **CCP Authoritarian and Dictator**
- Political Efforts:
 - “Xi Jinping Thought on Socialism” w/Chinese Characteristics”
 - Centralized Power above All Else
 - Strictly Enforce Party Discipline
 - Absolute Party Leadership
 - Absolute Military Control
 - Anti-Corruption/Challenger Removal
 - CCP Ideology over Religion or Country
 - More Assertive Foreign Policy
 - Strict Sovereignty Policy
 - Pervasive Belt and Road Initiative
 - Massive Censorship & Surveillance
 - Severe Threat to Human Rights
 - Cult of Personality
 - Anti-Monopoly
 - Socialistic
 - Illegal Air Defense Identification Zone (ADIZ)
 - Illegal Nine-Dash Line
 - Covid Delays/WHO manipulation



Xi Jinping Centenary Speech July 1, 2021

Focused on “Chinese Dream” and “National Rejuvenation” as well as
“Socialism with Chinese Characteristics”

- “Complete National Reunification is an inevitable requirement for realizing the great rejuvenation of the Chinese nation”
- “We must uphold the firm leadership of the Party”
- “China’s success hinges on the Party”
- “Strengthen the unity of the Chinese People...ensure great unity and solidarity”
- “Uphold the Central Committee’s authority and it’s centralized leadership”
- “Any attempt to divide the Party from the Chinese people or set the people against the party is bound to fail. More than 95 million Party members and more than 1.4 B Chinese people will never allow such a scenario to come to pass.”
- “We must accelerate the modernization of national defense and the armed forces. We will take comprehensive measures top enhance political loyalty of the armed forces.”
- “We Chinese are people who uphold justice and are not intimidated by threats of force. As a nation we have a strong sense of pride and confidence. We have never bullied, oppressed, or subjugated the people of any country, and we never will. By the same token, we will never allow any foreign force to bully, or subjugate us. Anyone who would attempt to do so will find themselves on a collision course with a great wall of steel forged by over 1.4 B Chinese people.”
- “Resolving the Taiwan* question and realizing China’s complete reunification is a historic mission and an unshakable commitment of the Communist Party of China. We must take resolute action to utterly defeat any attempt toward “Taiwan independence””

*Note: Xi Jinping met Taiwan’s former President Ma Ying-jeou in 2015 – **the first time in 50 years** political leaders from both sides have met. Taiwanese President Tsai Ing-Wen, “Taiwan would not accept a one country, two systems arrangement with the mainland.”



CCP "Wolf Warrior" Diplomacy



Chinese foreign ministry spokesman Zhao Lijian. The foreign ministry is one of many Chinese government organs increasingly employing aggressive diplomacy tactics.



Yang Jiechi, second from left, meeting with U.S. Secretary of State Antony Blinken in Anchorage, Alaska, in March. During the talks, Mr. Yang accused the United States of arrogance and hypocrisy. Pool photo by Frederic J. Brown



Chinese State Councilor and Foreign Minister Wang Yi meets with U.S. Deputy Secretary of State Wendy Sherman in Tianjin, China, on July 26. U RAN/XINHUA VIA GETTY IMAGES



Nationalistic Wolf Warrior 2



Popular Chinese "Rambo"



“Wolf Warrior” Headlines

China is embracing a new brand of foreign policy. Here's what wolf warrior diplomacy means



By [Ben Westcott](#) and [Steven Jiang](#), CNN

🕒 Updated 2:37 AM ET, Fri May 29, 2020

How China’s ‘wolf warrior’ diplomats use and abuse Twitter

October 28, 2020 | [Jessica Brandt](#) and [Bret Schafer](#)

CHINA POWER | DIPLOMACY | EAST ASIA

Interpreting China’s ‘Wolf-Warrior Diplomacy’

What explains the sharper tone to China’s overseas conduct recently?

By [Zhiqun Zhu](#)

May 15, 2020

Monkey Cage • [Analysis](#)

China’s ‘wolf warrior’ diplomats like to talk tough

We analyzed 20 years of Chinese Foreign Ministry transcripts to track the increase in hostile language

◆ WSJ NEWS EXCLUSIVE | [CHINA](#)

China’s Effort to Tame ‘Wolf Warrior’ Diplomats Is Stymied by Nationalism

Nearing its 100th birthday, the Communist Party struggles to manage a contrast between its popularity at home and its stained reputation abroad

China

China's 'wolf warrior' diplomacy is 'justified defence', envoy says

By Yew Lun Tian



China's Confucius Institutes

(Exerting "Soft Power" Tactics)

In April 2017, the National Association of Scholars released *Outsourced to China: Confucius Institutes and Soft Power in American Higher Education*, a comprehensive report on the way the Chinese government infiltrates American colleges and universities to enhance its own image. At that time, we counted **103 Confucius Institutes in the United States.**

Funding: ~\$10B/Year
2019 Globally: 530
2020 Goal: 1000

Confucius Institutes in the United States





Growing China Assertiveness

- **Assertiveness (and CCP Nervousness) due to:**

- Rapidly Growing Economy Slowing Down
- Military Strength Rising approaching Peer Competitor regionally
- Rising Nationalism
- Wide-Spread Corruption
- Growing Inequality
- Social Unrest/Public Protests
- Political Grievances
- Political Judicial System
- Central-Periphery Conflicts
- External Policy Engagement

- **Results in:**

- Political Insecurity
- Legitimacy Compensation/Over-reactions
- Hypersensitivities re. PRC and CCP Leadership – Saving Face, Stability, Control
- Need to Show Strength i.e. not Weak – both internal and external audience
- Expansive View of China's Dream – a “To-Be” Vision to aspire



Global GDP Projections

2020-21

Country	Nominal GDP		Share in global GDP
United States	21,922		24.2
China	16,835		18.6
Japan	5,103		5.6
Germany	4,318		4.8
France	2,918		3.2
United Kingdom	2,856		3.1
India	2,834		3.1

Source: International Monetary Fund, World Economic Outlook, October 2020



Bottom Line

“The Chinese Leadership is not only striving for great power status but also has embarked on a journey to reshape, alter and redefine elements of the existing international system to better fit its World View and interests.”

Nadege Rolland (Aug 20)

An Emerging China-Centric Order:

China's Vision for a New World Order in Practice

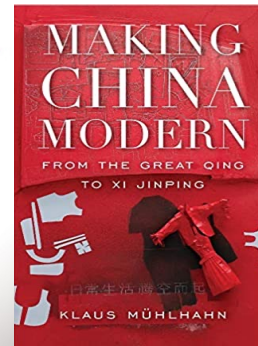
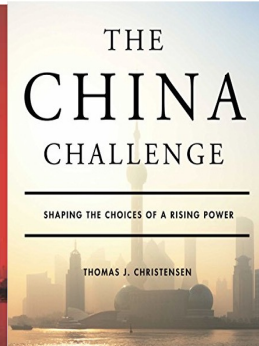
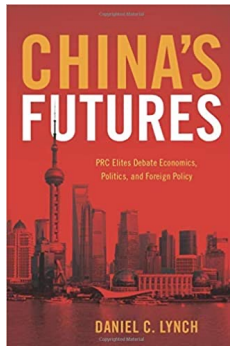
Note: China participates in ~90 International Organizations



China's Grand Strategy

Focused on the “Chinese Dream” and “National Rejuvenation” as well as “Socialism with Chinese Characteristics”

- China has taken for granted that America’s “unipolar” moment has passed – Iraq War, Financial Crisis, Global Withdrawal, Democratic Unrest
- Reconstitute the regional order, and eventually the global order, with new governance ideas, norms and rules
- Use “Peripheral Diplomacy” to weave neighbors into a Sino-centric network of economic, political, cultural and security relations faster than the US can respond to rebuild alliances
- Xi Jinping considers the regional community as an extension of the Chinese nation – “build a community of shared destiny of the Sino-centric regional order – a hierarchical regional system”
- Xi’s China Dream is for the PRC to be an authoritarian capitalistic civilization state that has international influence backed up by a strong military
- Shift from a US-led World Order to a Chinese-style Globalization
 - Become a rule maker for global governance





A Holistic, Whole-of-Nation Approach





Good Things to Know

- **Highly Centralized Decision Making & Aggressive Grand Strategy**
 - Coordinated Diplomacy to a **Grand Strategy** informed by China's National Interest
 - Five Sphere Integration Plan: Economic, Political, Cultural, Social, Ecological
 - Four-Pronged Comprehensive Strategy: Prosperous Society, Deepen Reform, Governance of Nation & Party
- Illegal Hong Kong “National Security Law” undermining free speech and democracy – June 20, 2021
- Strong Resistance to WHO Requests for Wuhan Laboratory COVID-19 Transparency
- State Exerting Power/Control over Capitalism – Big Tech, Education, Financial Transparency
 - Massive Valuation Losses (\$B)
- 320 incursions into Taiwan airspace in 2020
- China's CCP “Global Times” Survey (take with a grain or two of salt):
 - 70% of mainlanders strongly support using force re. Taiwan
 - 37% think it is best to use it in the next 5 years
- **Growing Chinese State Media rhetoric re. strength of military capabilities**
 - What matters most is whether China thinks the PLA will prevail re. Taiwan
- **South China Sea: 90% of Middle East Fossil Fuel Exports will go to Asia by 2035**
 - \$3.4 Trillion in shipborne commerce per year
 - Est. 11 Billion barrels of oil, 190 Trillion cubic feet of natural gas, vast fisheries & seafood
 - Illegal Islands (Hague Ruling), imposition of the 9 Dash Line & Air Defense Identification Zone (ADIZ)
 - PRC Official, “If the Malacca Strait were closed for just one day, the disruption in energy supplies might cause social unrest in China”)
- PACOM ADM Davidson, “China will have the ability to successfully invade Taiwan in 6 yrs”



My Take: Insights that Guide CCP Thinking

- 100 Years of Humiliation
- Sun Tzu – The Art of War
- 36 Strategems
- CCP is the Definitive Leader
- Control and Compliance over Freedom
- Social Authoritarianism vs. Democracy
- Human Rights are subservient to the PRC Rule
- PRC Ideology over Religion or Nation
- Massive PRC Fear & Insecurity i.e. Paranoia – Fragile Surveillance State
- Selfish, Arrogant and Belligerent – What’s In It For Me (WIIFM) Attitude
 - Generally Lawless & Untrustworthy
- Long & Short-Term Thinking – Strategic Thinkers, Top-Down Planning
- “One China” Policy – The Red Line
- Insatiably Focused on Achieving “Great Power Status”

} - Winning however necessary –
Insidious, devious and malevolent.
- Whatever one can get away with
regardless of morals, values &
ethics – desperate to save/gain Face



Demographics

GOVERNMENT

Chief of State

President Xi Jinping

Head of Government

Premier LI Keqiang

Government Type

communist party-led state

Capital

Beijing

Legislature

unicameral National People's Congress or Quanguo Renmin Daibiao Dahui (maximum of 3,000 seats)

Judiciary

Supreme People's Court (consists of over 340 judges including the chief justice and 13 grand justices)

Ambassador to US

Ambassador CUI Tiankai

US Ambassador

Ambassador Terry BRANSTAD

ECONOMY

Economic Overview

largest economy and exporter in the world, but one that continues to pursue state-directed industrial, trade, and investment policies, including state-support of key sectors

GDP (Purchasing Power Parity)

\$25.36 trillion (2018 est.)

GDP per capita (Purchasing Power Parity)

\$18,200 (2018 est.)

Exports

\$2.49 trillion (2018 est.)

partners: US 19.2%, Hong Kong 12.2%, Japan 5.9%, South Korea 4.4% (2018)

Imports

\$2.14 trillion (2018 est.)

partners: South Korea 9.7%, Japan 8.6%, US 7.3%, Germany 5%, Australia 4.9% (2018)



Demographics

GEOGRAPHY

Area

Total: 9,596,960 sq km

Land: 9,326,410 sq km

Water: 270,550 sq km

Climate

extremely diverse; tropical in south to subarctic in north

Natural Resources

coal, iron ore, helium, petroleum, natural gas, arsenic, bismuth, cobalt, cadmium, ferrosilicon, gallium, germanium, hafnium, indium, lithium, mercury, tantalum, tellurium, tin, titanium, tungsten, antimony, manganese, magnesium, molybdenum, selenium, strontium, vanadium, magnetite, aluminum, lead, zinc, rare earth elements, uranium, hydropower potential (world's largest), arable land

as of August 2020

PEOPLE & SOCIETY

Population

1.4 billion (July 2020 est.)

Population Growth

0.32% (2020 est.)

Ethnicity

Han Chinese 91.6%, Zhuang

1.3%, other (includes Hui,

Manchu, Uighur, Miao, Yi,

Tujia, Tibetan, Mongol, Dong, Buyei, Yao, Bai, Korean, Hani, Li,

Kazakh, Dai) 7.1% (2010 est.)

Language

Standard Chinese or Mandarin (official; Putonghua, based on the Beijing dialect), Yue (Cantonese), Wu (Shanghainese), Minbei (Fuzhou), Minnan (Hokkien-Taiwanese), Xiang, Gan, Hakka dialects, minority languages

Religion

Buddhist 18.2%, Christian 5.1%, Muslim 1.8%, folk religion 21.9%, Hindu < 0.1%, Jewish < 0.1%, other 0.7%, unaffiliated 52.2% (2010 est.)

Urbanization

urban population: 61.4% of total population (2020)

rate of urbanization: 2.42% annual rate of change (2015-20 est.)

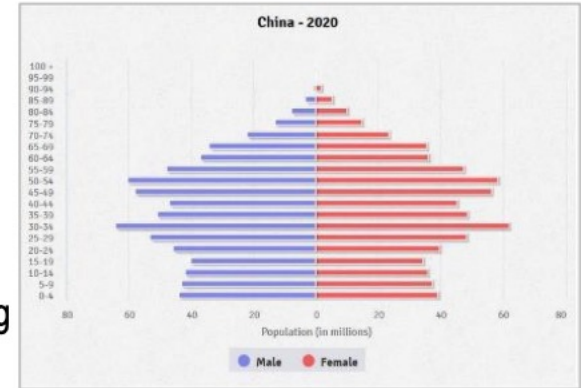
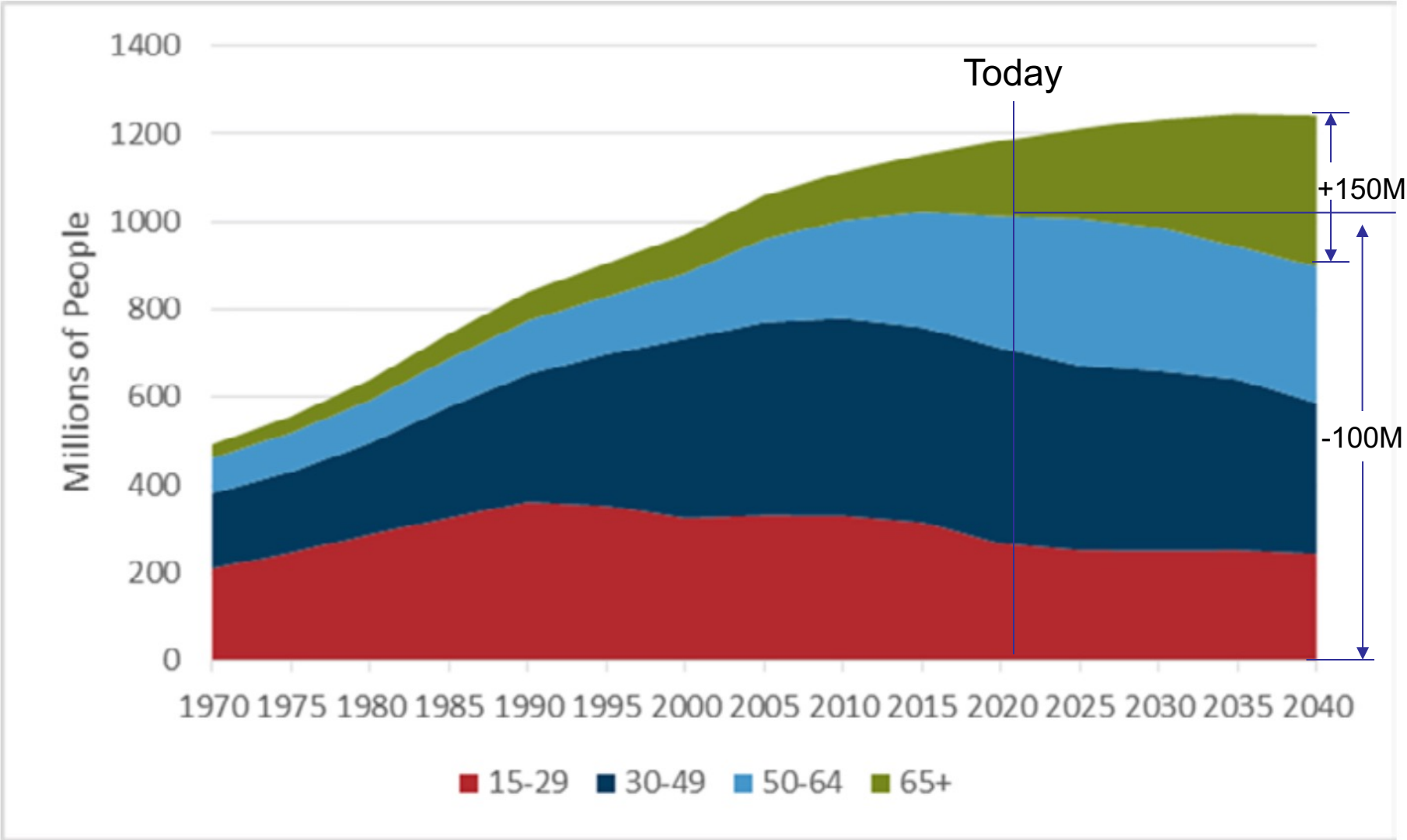


FIGURE 7: THE CHANGING AGE DISTRIBUTION OF THE CHINESE POPULATION

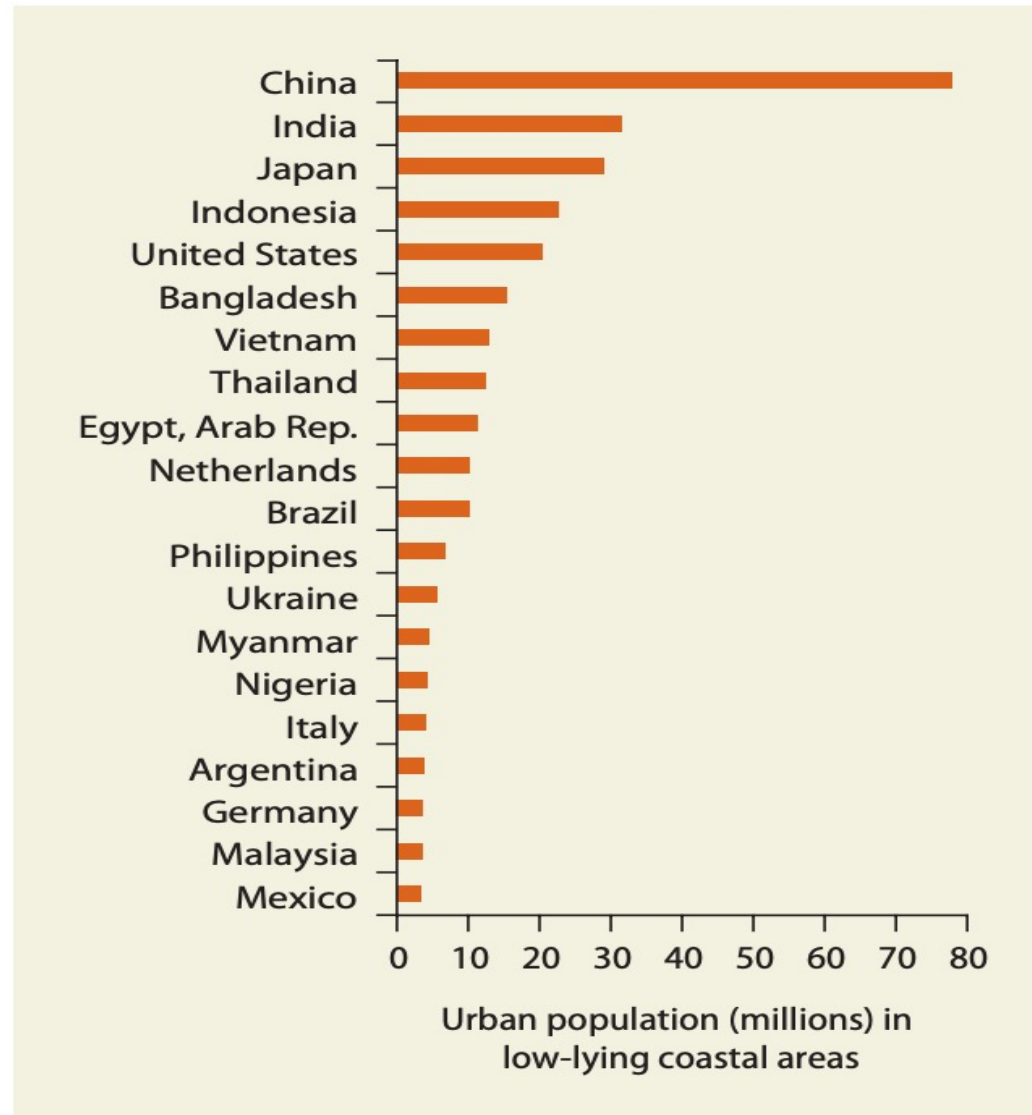


Source: UN Department of Economic and Social Affairs, Population Division, 2019 Revision of World Population Prospects, 2019, <https://population.un.org/wpp/> Graphic inspired by Nicholas Eberstadt, *China's Demographic Outlook to 2040 and Its Implications*, (American Enterprise Institute, Washington D.C. 2019), p.5. <https://www.aei.org/wpcontent/uploads/2019/01/China%E2%80%99s-Demographic-Outlook.pdf>



FIGURE 3.13 Vulnerability to sea-level rise and storm surges by country, circa 2000

Chinese research has estimated that a one-meter rise in sea level would inundate 92,000 square kilometers of China's coast, thereby displacing 67 million people. (Wikipedia)



Sources: World Bank 2008; McGranahan, Balk, and Anderson 2007.
Note: Low-lying coastal areas are defined as "the contiguous area along the coast that is less than 10 meters above sea level."

BOX 3.9 The challenge of China's water pollution

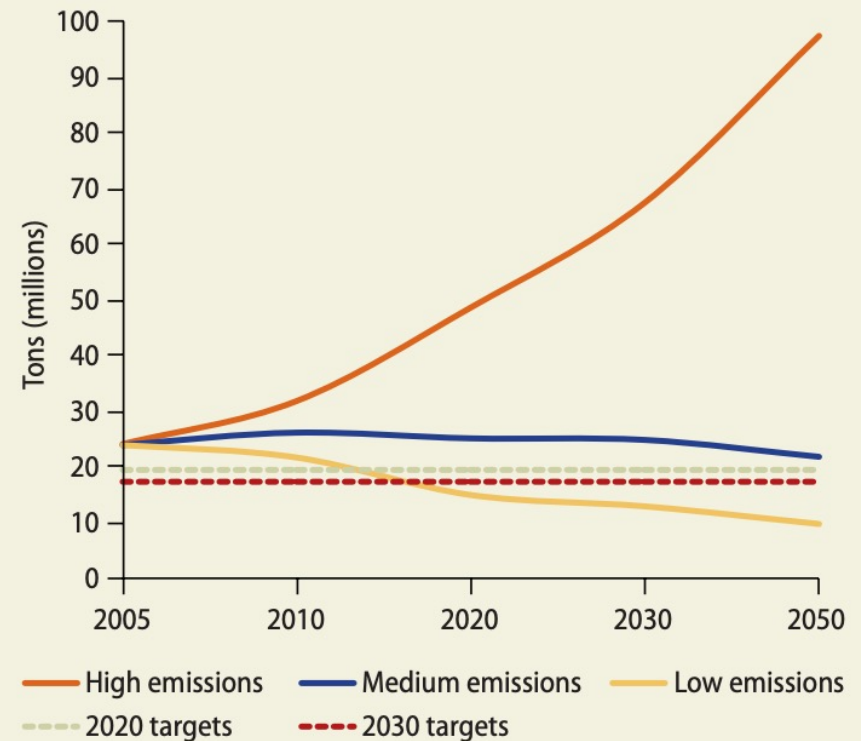
China's surface and groundwater supplies are low on a per capita basis, but useful supplies are much lower yet because of pollution. Although seen most vividly in pictures of an algae-choked Lake Tai, across water-stressed North China, 40 percent of the rivers fall into the two worst water quality categories (Grades V and V+), meaning direct use would endanger health. Water treatment is very expensive. The government has necessary, but ambitious, targets to control pollution:

Ministry of Environmental Protection Targets

- By 2020: 60 percent of China's surface waters meet the standards for Grades I–III (compared to 57 percent in 2009)
- By 2030: 70 percent of China's surface waters meet the standards for Grades I–III
- By 2050: 80 percent of China's surface waters meet the standards for Grades I–III.

Based on global experience, success in improving water quality will depend on a combination of aggressive regulatory monitoring and enforcement with a strong set of economic incentives. China's interventions to date have focused on industrial and municipal point-source pollution. While continuing

FIGURE B3.9.1 Wastewater emissions projections (COD), 2005–50



Source: MEP and CAE 2011.

Note: Chemical oxygen demand (COD) is an indirect measure of the severity of water pollution

to reduce those sources of pollution, the country will need to tackle the even more difficult problem of nonpoint sources.



Economic Challenges

The Chinese Government faces numerous economic challenges including:

1. Reducing its high domestic savings rate and correspondingly low domestic household consumption;
2. Managing its high corporate debt burden to maintain financial stability;
3. Controlling off-balance sheet local government debt used to finance infrastructure stimulus;
4. Facilitating higher-wage job opportunities for the aspiring middle class, including rural migrants and college graduates, while maintaining competitiveness;
5. Dampening speculative investment in the real estate sector without sharply slowing the economy;
6. Reducing industrial overcapacity; and
7. Raising productivity growth rates through the more efficient allocation of capital and state-support for innovation.



WTO Rules Compliance

A. China's membership in the WTO was approved in December, 2001 agreeing to the **obligations of more than 20 existing multilateral WTO agreements** including:

Most-favored nation (MFN) treatment, national treatment, transparency and independent review of administrative decisions, sanitary measures, technical barriers to trade, trade-related investment measures, customs valuation, rules of origin, import licensing, antidumping, subsidies and countervailing measures, trade-related aspects of IP rights and services.

B. The United States has brought nearly **two dozen cases against China** at the WTO such as:

- (1) local content requirements in the automobile sector;
- (2) discriminatory taxes in the integrated circuit sector;
- (3) hundreds of prohibited subsidies in a wide range of manufacturing sectors;
- (4) inadequate intellectual property rights (IPR) enforcement in the copyright area;
- (5) significant market access barriers in copyright-intensive industries;
- (6) severe restrictions on foreign suppliers of financial information services;
- (7) export restraints on numerous raw materials;
- (8) a denial of market access for foreign suppliers of electronic payment services;
- (9) repeated abusive use of trade remedies;
- (10) excessive domestic support for key agricultural commodities;
- (11) the opaque and protectionist administration of tariff-rate quotas for key agricultural commodities; and
- (12) discriminatory regulations on technology licensing.



Key US Concerns re. China Trade

U.S. Assessment for WTO

Industrial Plans

State-Owned Enterprises

Industrial Subsidies

Fisheries Subsidies

Excess Capacity

Indigenous Innovation

Technology Transfer

Investment Restrictions

Administrative Licensing

Standards

Secure and Controllable Policies

Encryption

Competition Policy

Pharmaceuticals

Medical Devices

Cosmetics Export Restraints

Value-added Tax Rebates and Related Policies

Import Ban on Remanufactured Products

Import Ban on Recyclable Materials

Trade Remedies

Government Procurement

Corporate Social Credit System

Intellectual Property Rights

Trade Secrets

Bad Faith Trademark Registration

Online Infringement

Counterfeit Goods

Agricultural Domestic Support

Tariff-rate Quota

Administration

Biotechnology Approvals

Food Safety Law

Value-added Tax Rebates

Banking Services Securities,

Asset Management

Insurance Services

Electronic Payment Services

Internet-enabled Payment Services

Telecommunications Services

Internet Regulatory Regime

Voice-over-Internet Protocol Services

Cloud Computing Services

Audio-visual and Related Services

Theatrical Films & Online Video and Entertainment

Software Services

Legal Services

Express Delivery Services

Data Restrictions



FBI Assessment

DIFFERENCES IN BUSINESS PRACTICES

UNITED STATES

GENERALLY ACCESSIBLE MARKET

MARKET ECONOMY

DEVELOPMENT BY INNOVATION

INDEPENDENT JUDICIARY AND SEPARATION OF POWERS

LAWS PROTECTING INTELLECTUAL PROPERTY

NO GOVERNMENT-SPONSORED ECONOMIC ESPIONAGE

CHINA

HIGHLY RESTRICTIVE MARKET

STATE-RUN ECONOMY

DEVELOPMENT BY THEFT, REPLICATION, AND
COMMERCIALIZATION

JUDICIARY SUBORDINATE TO THE GOVERNMENT

UNEQUAL PROTECTION OF INTELLECTUAL PROPERTY

GOVERNMENT-SPONSORED ECONOMIC ESPIONAGE



FBI Assessment

“The greatest long-term threat to our nation’s information and intellectual property, and to our economic vitality, is the counterintelligence and economic espionage threat from China.”

FBI Director Christopher Wray



USTR Section 301 Report

Cyber Espionage and Intellectual Property

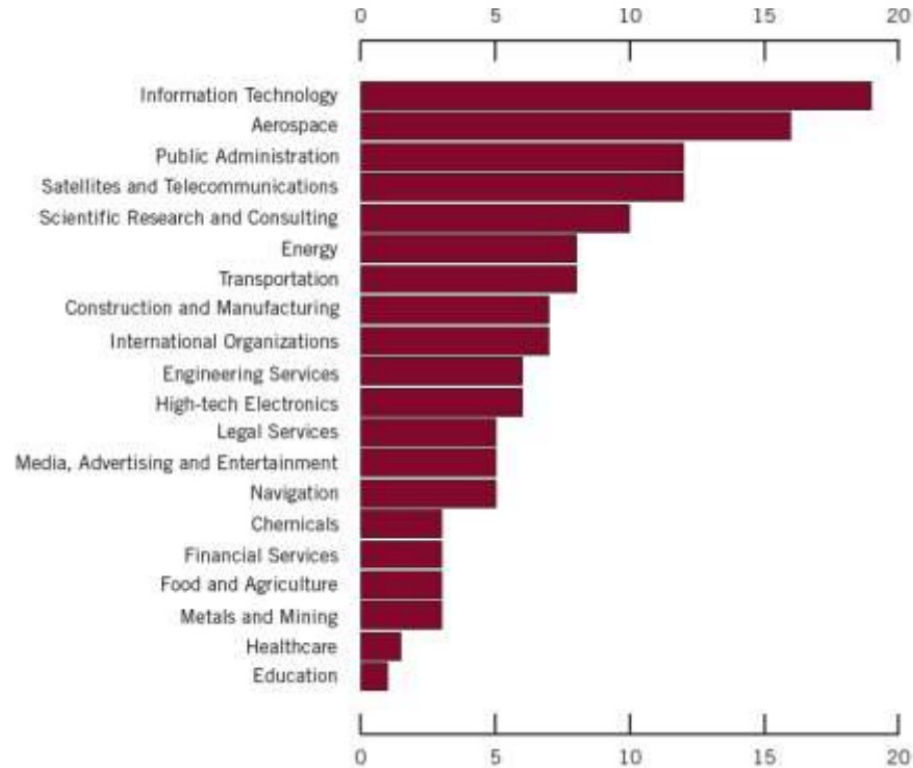
According to Mandiant, this unit of the 3PLA stole data from at least 141 organizations, 115 of which are based in the United States, representing 20 major business sectors. The victims of these intrusions match industries that China has identified as strategic priorities, including four of the seven “strategic emerging industries” that China identified in its 12th Five-year Plan.⁹⁸² The table below illustrates the number of 3PLA victims by sector in Mandiant’s data set.

OFFICE of the UNITED STATES TRADE REPRESENTATIVE
EXECUTIVE OFFICE OF THE PRESIDENT

FINDINGS OF THE INVESTIGATION INTO
CHINA’S ACTS, POLICIES, AND PRACTICES
RELATED TO TECHNOLOGY TRANSFER,
INTELLECTUAL PROPERTY, AND INNOVATION
UNDER SECTION 301 OF THE TRADE ACT OF 1974



March 22, 2018



Source: MANDIANT APT1: EXPOSING ONE OF CHINA’S CYBER ESPIONAGE UNITS



International Law

- **International Law Matters to China**

- A tool for accomplishing objectives and a source to use for legitimization and delegitimization

- **Proactively working to shape laws to reflect China's values**

- **Interprets laws to advance interests**

- Picks and chooses what and how it follows the laws

- **China continues to emphasize its "sovereignty"**

- **China ratifies treaties but does not incorporate them – will not constrain the State's power**

- **United Nations Convention on the Law of the Sea (UNCLOS)**

- Artificial Islands

- Nine-Dash Line

- ADIZ



Not Recognized by International Law

- **Uyghurs and Turkic Muslims**

- Indoctrination Camps, Forced Population Reductions

- **Meets UN's Definition of Genocide**



Human Rights Watch

World Report 2021

ESSAYS ▾

COUNTRIES ▾

LANGUAGES ▾

DONATE NOW

HUMAN
RIGHTS
WATCH



China
Events of 2020

Pro-democracy lawmaker Andrew Wan is arrested by riot police during a protest in Hong Kong, China, July 1, 2020. Wan was one of the first people arrested under Hong Kong's new National Security Law.

© 2020 Yat Kai Yeung/NurPhoto via Getty Images

Key Topics:

- **Hong Kong** – Imposed “National Security Law,” Democracy Shut-Down
- **Xinjiang** – Uyghurs detention/re-education centers (X260)
- **Tibet** – Restrict Religion, Relocation/Rural “Transformation,” “Nationality Unity Model” imposition, Loyalty **Education**
- **COVID-19 Response** – Withheld Information, Detentions, Wuhan/WHO
- **Mass Surveillance** – Media Content Control, Censorship, Social Scores
- **Foreign Journalists** – Mistreatment, Expelling, Barring, Delaying Visas



Pew Research Center 

FOR RELEASE OCTOBER 6, 2020

Unfavorable Views of China Reach Historic Highs in Many Countries

Majorities say China has handled COVID-19 outbreak poorly

By Laura Silver, Kat Devlin and Christine Huang

FOR MEDIA OR OTHER INQUIRIES:

Laura Silver, Senior Researcher
Stefan Cornibert, Communications Manager

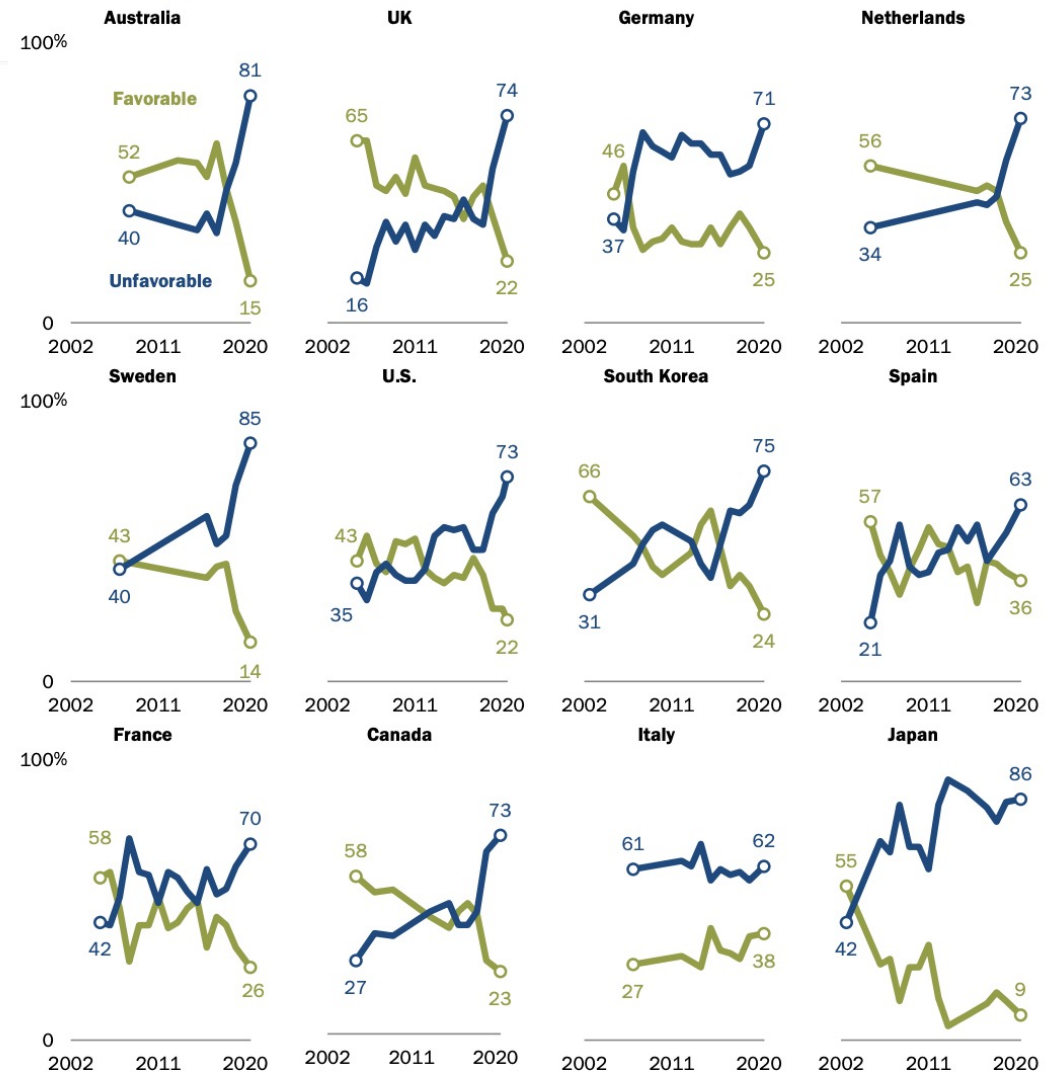
202.419.4372
www.pewresearch.org

RECOMMENDED CITATION

Pew Research Center, October, 2020, "Unfavorable Views of China Reach Historic Highs in Many Countries"

Increasingly negative evaluations of China across advanced economies

% who have a(n) ___ view of China



Note: Belgium and Denmark not surveyed prior to 2020. In Italy, 2020 data from telephone surveys; prior data from face-to-face surveys. Those who did not answer are not shown.

Source: Summer 2020 Global Attitudes survey. Q8b.

"Unfavorable Views of China Reach Historic Highs in Many Countries"



Pew Research Center 

FOR RELEASE OCTOBER 6, 2020

Unfavorable Views of China Reach Historic Highs in Many Countries

Majorities say China has handled COVID-19 outbreak poorly

BY Laura Silver, Kat Devlin and Christine Huang

FOR MEDIA OR OTHER INQUIRIES:

Laura Silver, Senior Researcher
Stefan Cornibert, Communications Manager

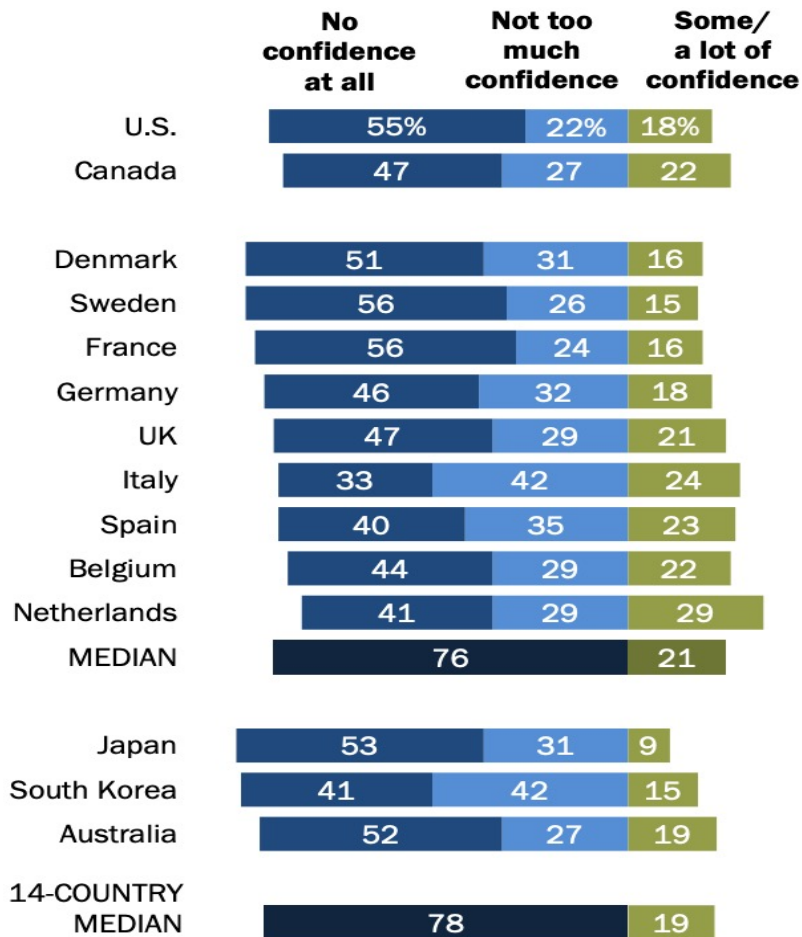
202.419.4372
www.pewresearch.org

RECOMMENDED CITATION

Pew Research Center, October 2020, "Unfavorable Views of China Reach Historic Highs in Many Countries"

Few trust Xi's actions in global arena

% who have ___ in Chinese President Xi Jinping to do the right thing regarding world affairs



Note: Those who did not answer are not shown.
Source: Summer 2020 Global Attitudes survey. Q15b.
"Unfavorable Views of China Reach Historic Highs in Many Countries"

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Pew Research Center 

FOR RELEASE OCTOBER 6, 2020

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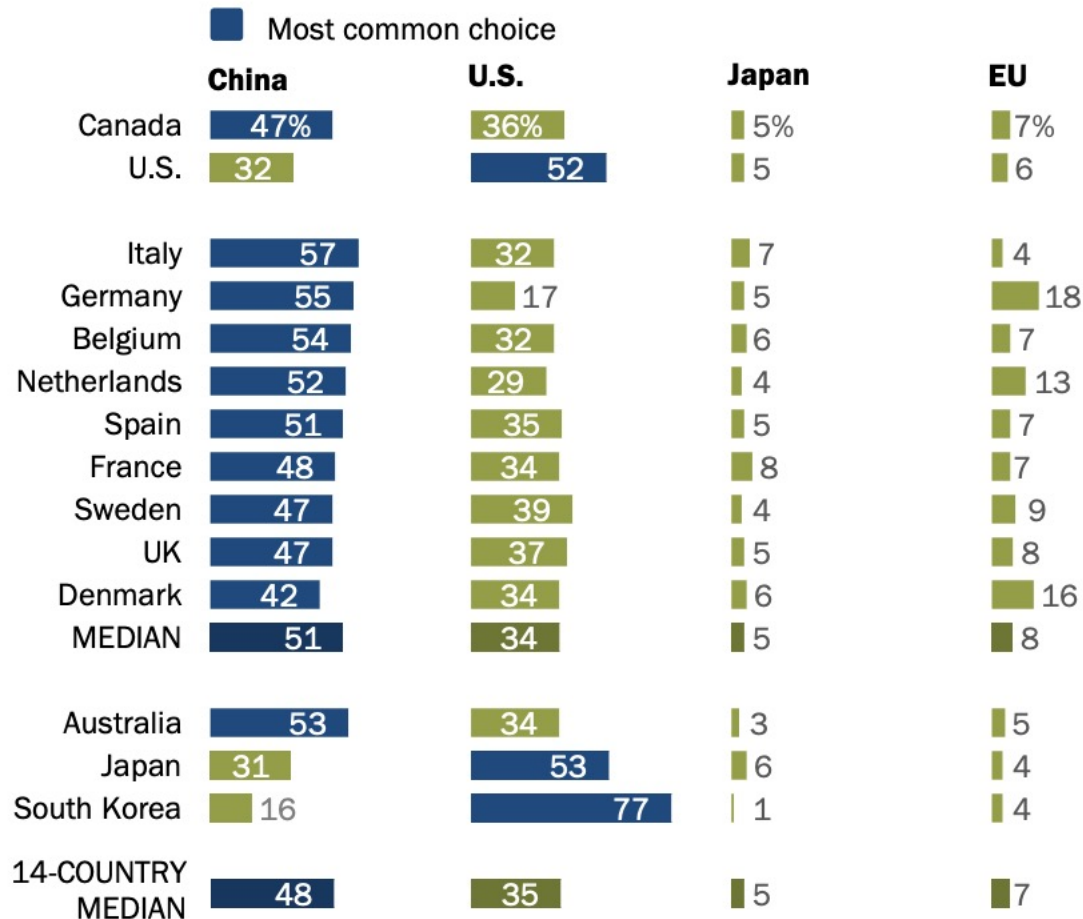
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 www.pewresearch.org

RECOMMENDED CITATION

Pew Research Center, October, 2020, "Unfavorable Views of China Reach Historic Highs in Many Countries"

Europeans see China as world's dominant economic power

% who say ___ is the world's leading economic power



Note: Those who did not answer are not shown.

Source: Summer 2020 Global Attitudes survey. Q14.

"Unfavorable Views of China Reach Historic Highs in Many Countries"

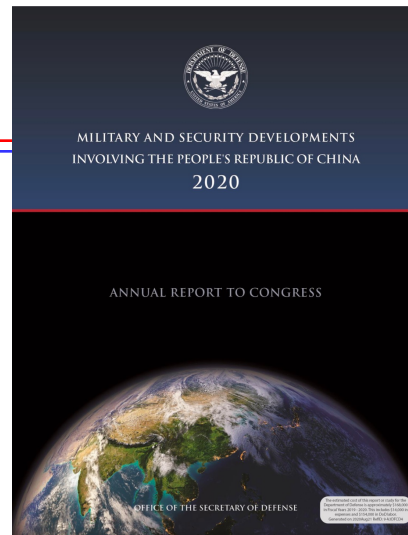
PEW RESEARCH CENTER



CHINA'S PUSH FOR GLOBAL POWER

The Chinese Communist Party (CCP) will continue its whole-of-government efforts to spread China's influence, undercut that of the United States, drive wedges between Washington and its allies and partners, and foster new international norms that favor the authoritarian Chinese system. Chinese leaders probably will, however, seek tactical opportunities to reduce tensions with Washington when such opportunities suit their interests. China will maintain its major innovation and industrial policies because Chinese leaders see this strategy as necessary to reduce dependence on foreign technologies, enable military advances, and sustain economic growth and thus ensure the CCP's survival.

- Beijing sees increasingly competitive US-China relations as part of an epochal geopolitical shift and views Washington's economic measures against Beijing since 2018 as part of a broader US effort to contain China's rise.
- China is touting its success containing the COVID-19 pandemic as evidence of the superiority of its system.
- Beijing is increasingly combining its growing military power with its economic, technological, and diplomatic clout to preserve the CCP, secure what it views as its territory and regional preeminence, and pursue international cooperation at Washington's expense.



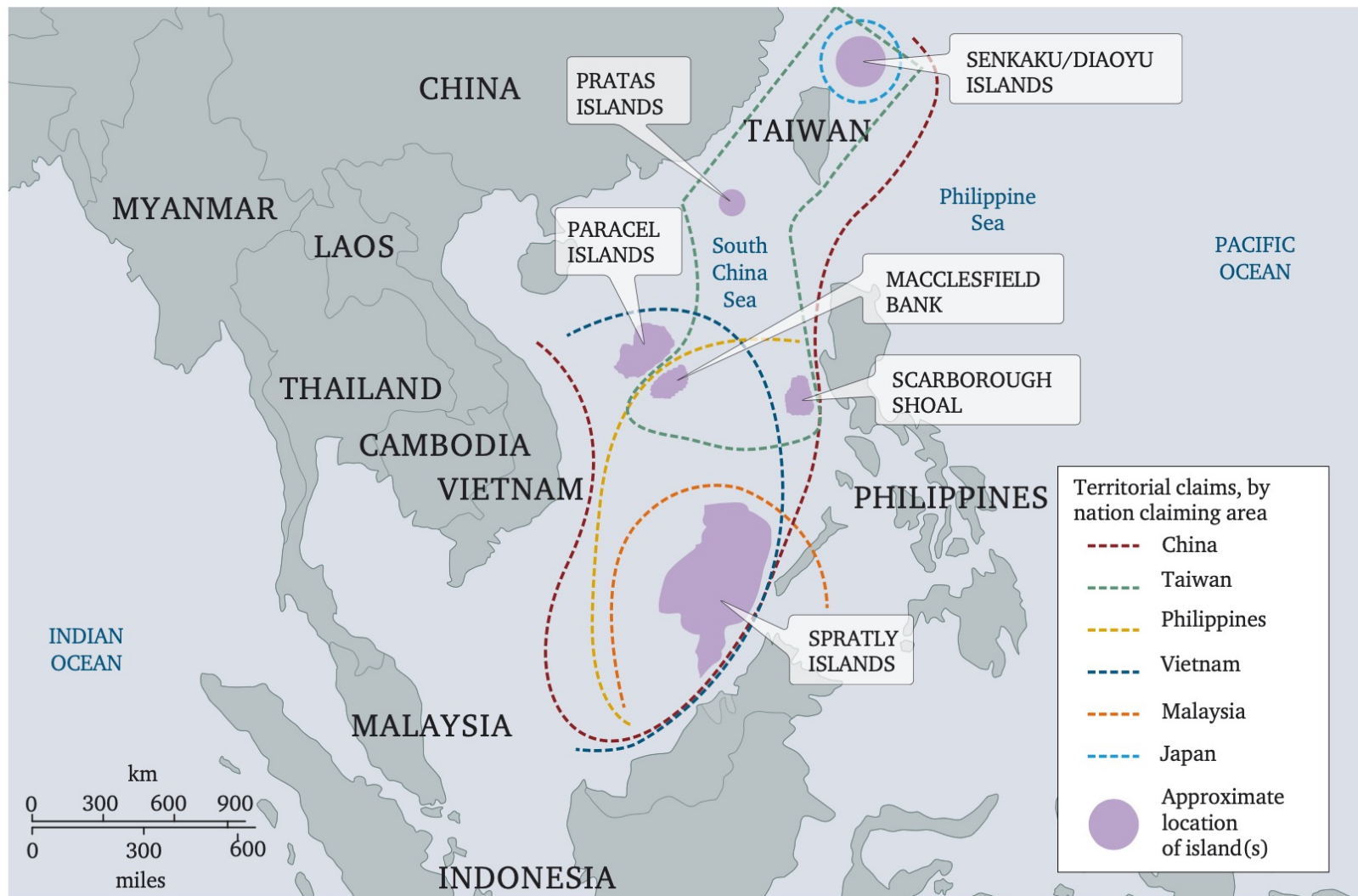
SPECIAL TOPIC: PLA'S APPROACH TOWARD INFORMATIZATION AND INTELLIGENTIZATION, INCLUDING ARTIFICIAL INTELLIGENCE

The People's Liberation Army (PLA) sees emerging technologies as driving a shift to “intelligentized” warfare from today’s “informatized” way of war. PLA strategists broadly describe intelligentized warfare as the operationalization of artificial intelligence (AI) and its enabling technologies, such as cloud computing, big data analytics, quantum information, and unmanned systems, for military applications. These technologies, according to PRC leaders—including Chairman Xi Jinping—represent a “Revolution in Military Affairs” for which China must undertake a whole-of-government approach to secure critical economic and military advantages against advanced militaries.

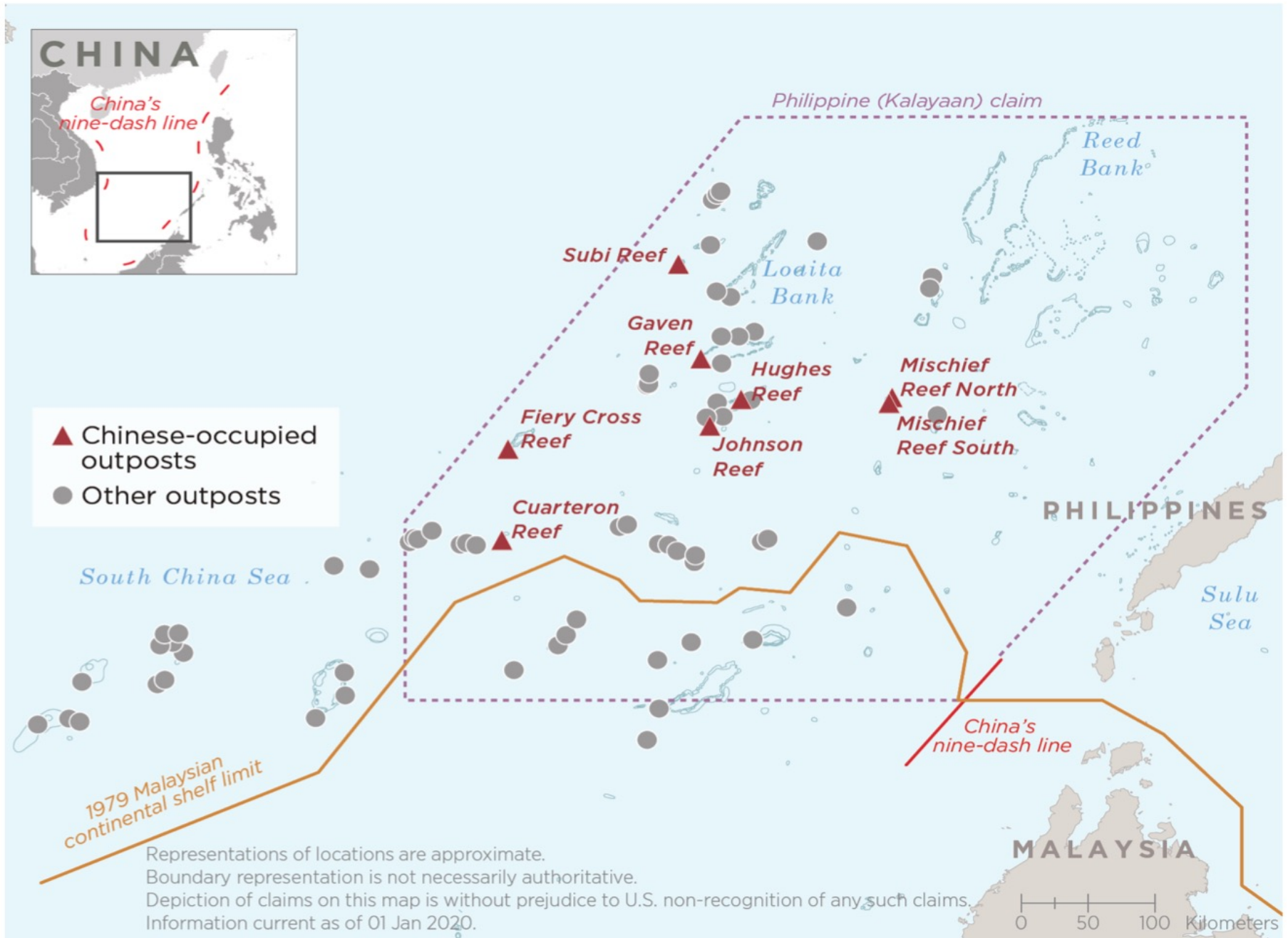


Territorial Claims

Map: Competing territorial claims in the South China Sea

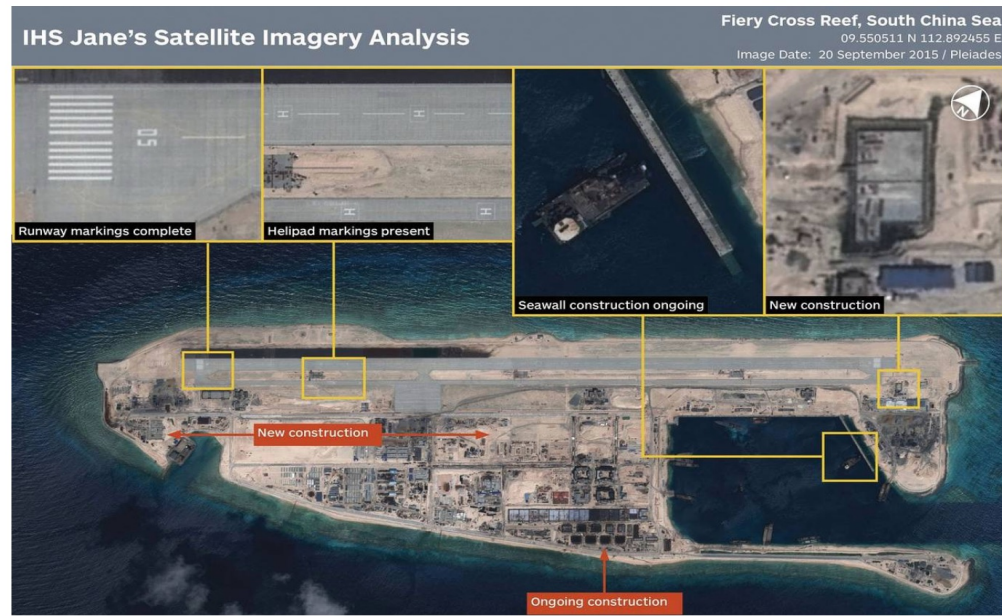


Outposts in the Spratly Islands



China's President Pledges No Militarization in Disputed Islands

Statement at White House offers few details, leaving some questioning commitment



Satellite imagery released on Friday shows that China has completed a runway on an artificial island in the South China Sea
PHOTO: CNES, AIRBUS DEFENCE AND SPACE/IHS JANE'S

By [Jeremy Page](#), [Carol E. Lee](#) and [Gordon Lubold](#)
Updated Sept. 25, 2015 6:00 pm ET

Satellite images seem to show anti-aircraft guns and other weapons on man-made outcrops



— A satellite image shows what CSIS Asia Maritime Transparency Initiative says appears to be anti-aircraft guns on an artificial island in the South China Sea in this image released on Tuesday. DIGITALGLOBE / Reuters



An image shows what CSIS/AMTI says appears to be anti-aircraft guns and close-in weapons systems on the artificial island Hughes Reef © Reuters



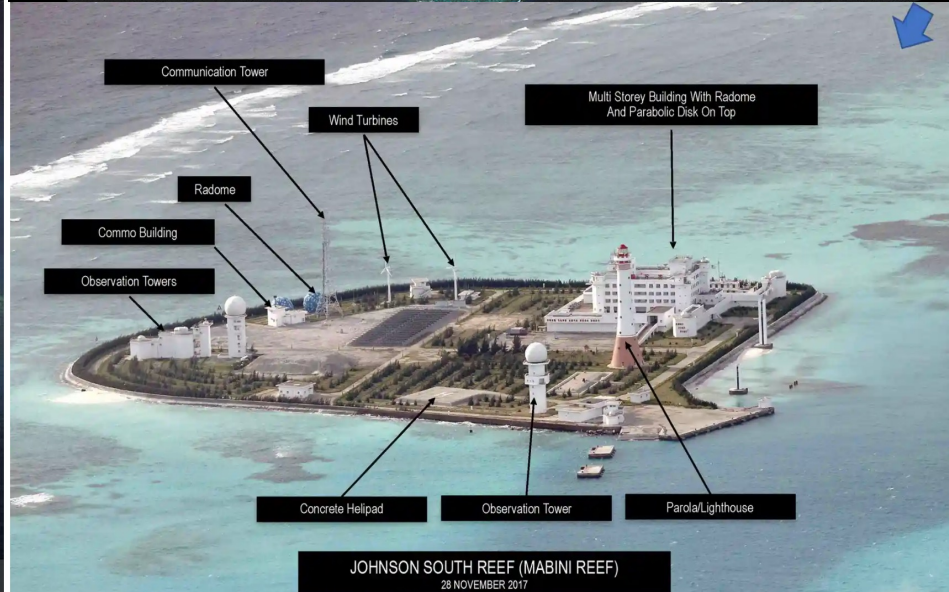
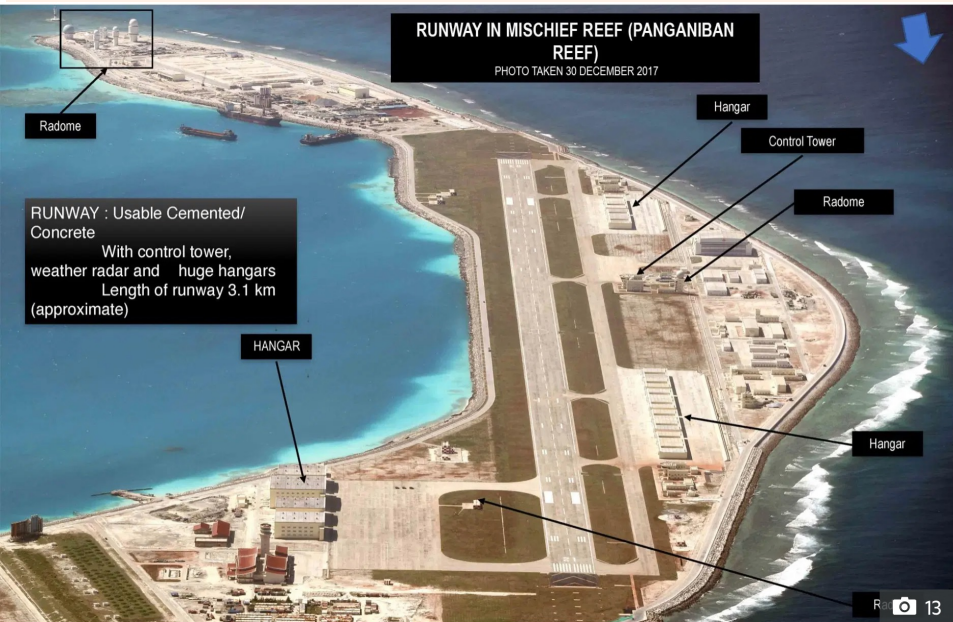
China's Man-Made Militarized Islands



Chinese construction at Fiery Cross Reef in the disputed Spratly Islands in the South China Sea © EPA



Subi Reef | 13 Nov 2017 | GeoEye-1
© DigitalGlobe supplied by European Space Imaging





Made in China 2025

China seeks to upgrade its economy from one that largely assembles goods for foreign firms to one that increasingly invents the products it makes. MIC 2025 notes that “China’s manufacturing sector is large but not strong.” The plan prioritizes upgrading manufacturing through advances in technology innovation (smart manufacturing) and manufacturing-tied services. Specifically, China aims to:

By 2025. Boost manufacturing quality, innovation, and labor productivity; obtain an advanced level of technology integration; reduce energy and resource consumption; and develop globally competitive firms and industrial centers.











By 2035. Reach parity with global industry at intermediate levels, improve innovation, make major breakthroughs, lead innovation in specific industries, and set global standards.

By 2049. Lead global manufacturing and innovation with a competitive position in advanced technology and industrial systems. (This date coincides with the 100th anniversary of the founding of the People’s Republic of China.)



Figure 1: China's Industrial Priorities (2015-2025)

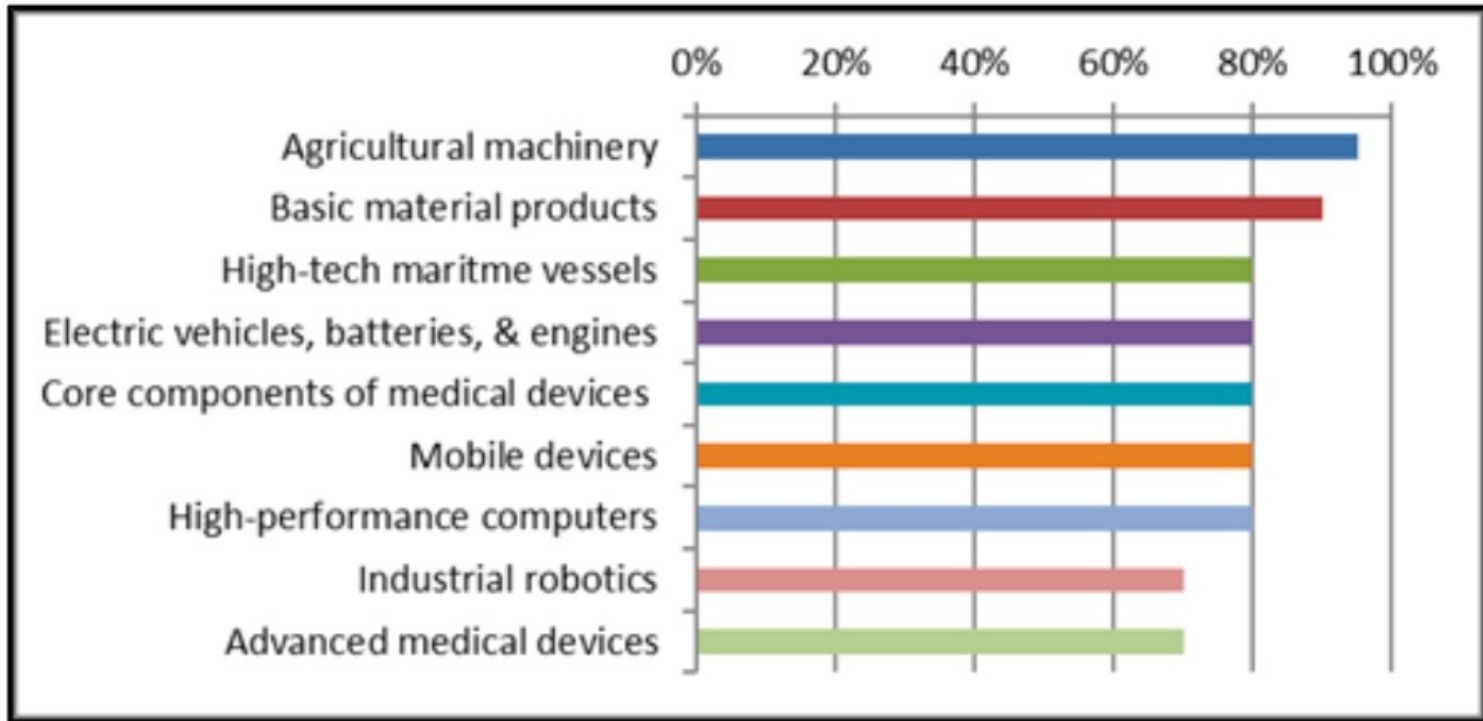
The "Made in China 2025" plan highlights 10 sectors:

 New generation information technology	 New energy and energy-saving vehicles
 High-end computerized machines and robots	 Energy equipment
 Aerospace	 Agricultural machines
 Maritime equipment and high-tech ships	 New materials
 Advanced railway transportation equipment	 Biopharma and high-tech medical devices

Source: "Notice of the State Council on Issuing Made in China 2025, May 8, 2015, Guofa [2015] No. 28."



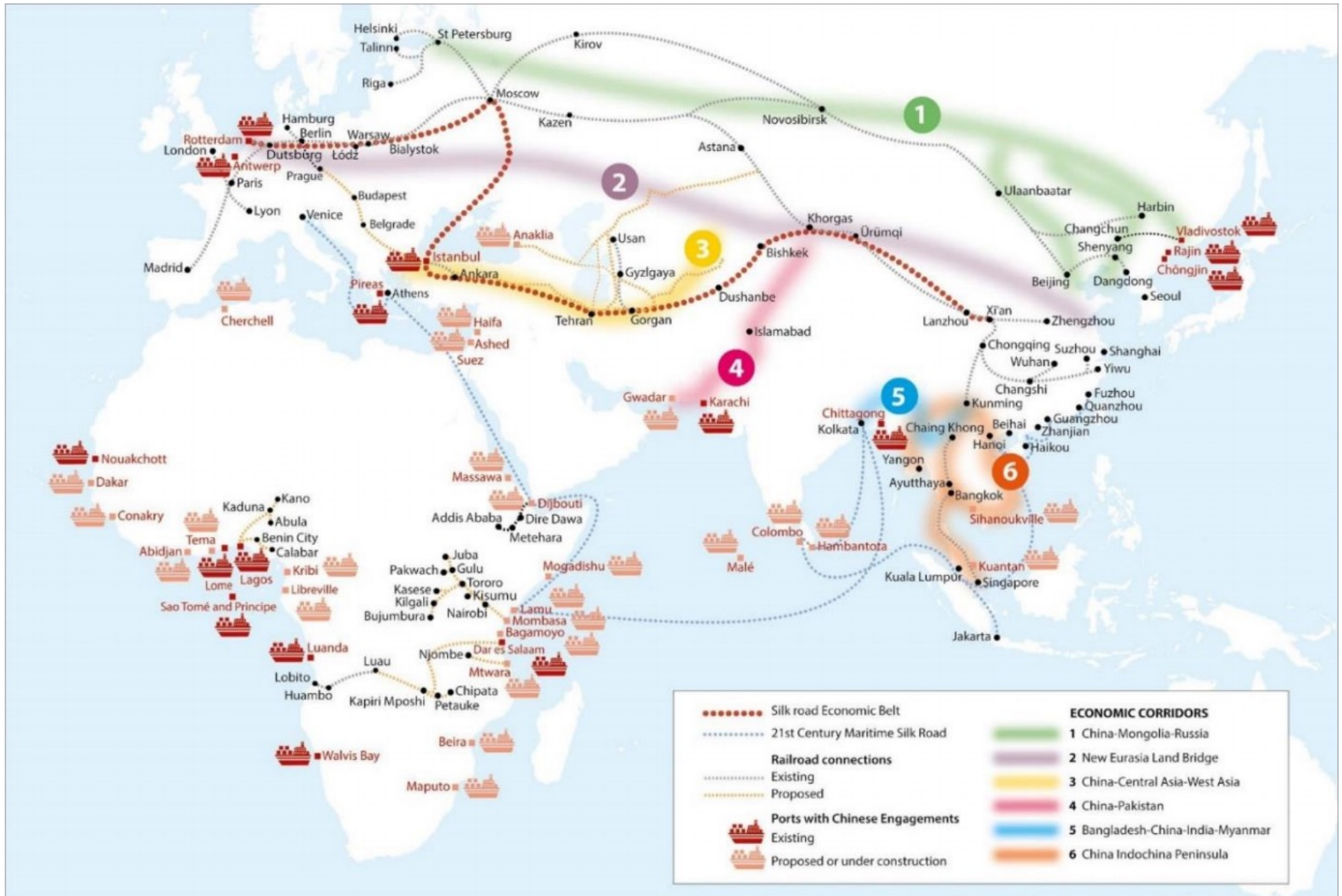
Figure 2: Select MIC 2025 Domestic Content Goals



Source: U.S.-China Business Council.

Note: Dates for domestic content goals range from 2020 to 2030.

Figure 3. One (land) belt one (maritime) road



Source: OECD research from multiple sources, including: HKTDC, MERICS, Belt and Road Center, Foreign Policy, The Diplomat, Silk Routes, State Council Information Office of the People's Republic of China, WWF Hong Kong (China).

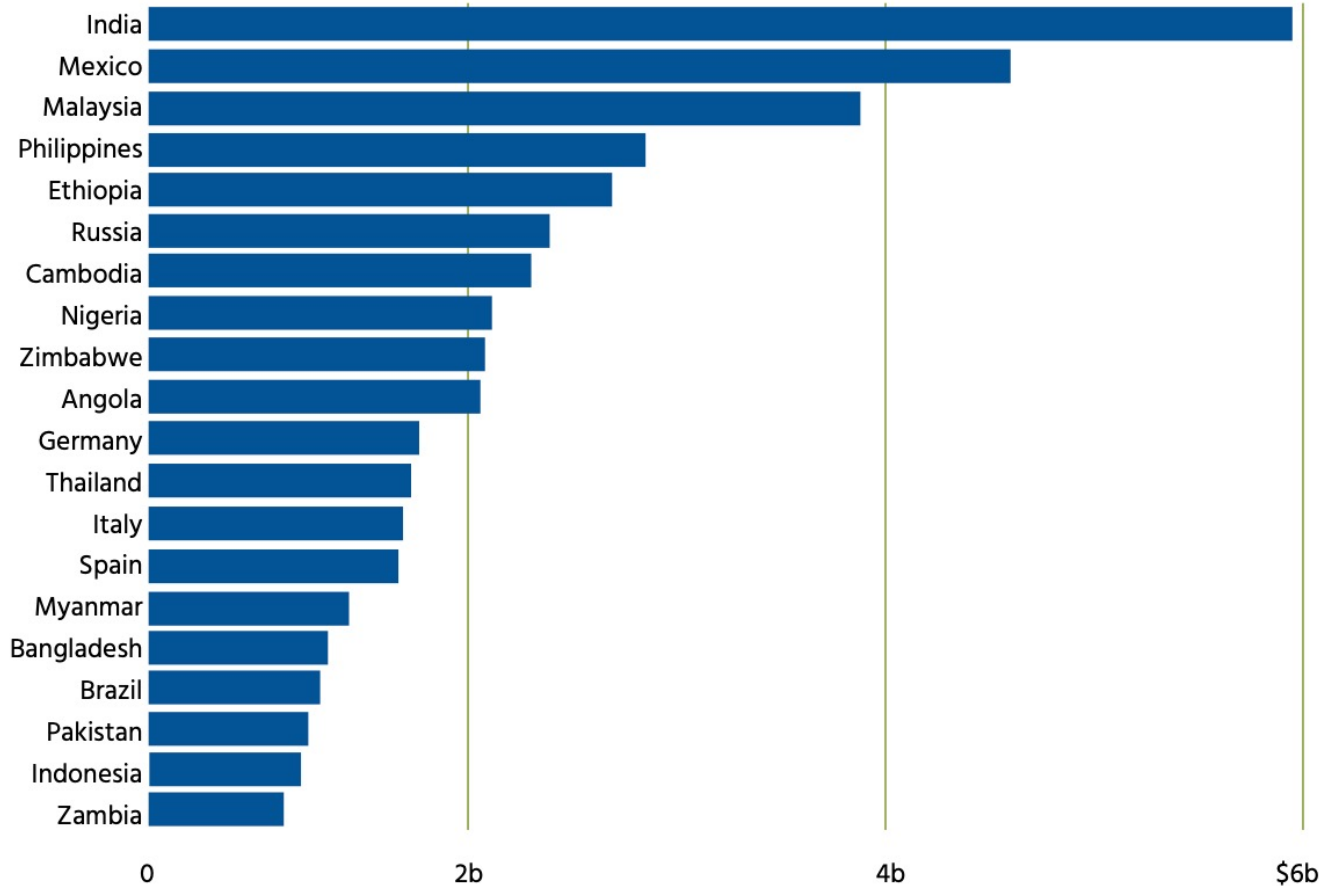


Chart III – China's Digital BRI spending by country

China's Digital BRI spending by country

Expanding network

China's spending on Digital Silk Road projects, by country



Data: RWR Advisory Group. Includes projects completed or initiated outside China since 2012 that enhance the digital infrastructure of the target country. Does not include mergers or acquisitions. Dollar values for some projects are unavailable and therefore aren't reflected in country totals.



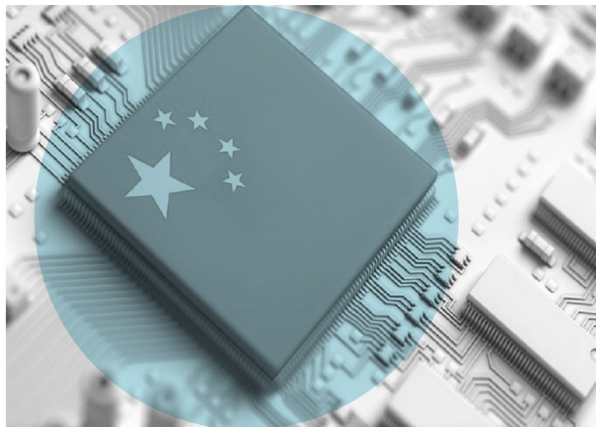
Figure 1 – Targets for standards setting

hinrich foundation
advancing sustainable global trade

JULY 2021

China's quest to shape the world through standards setting

BY EMILY DE LA BRUYÈRE



Category	Field	First appearance (if not 2003)	Last appearance (if not 2021)	Times featured
Staple goods	Agriculture	-	-	15
	Food	-	-	14
	Light industry	-	-	9
	Product and production safety	-	2019	8
Energy and environmental protection	Climate, ecology, and pollution	-	-	14
	New energy	2008	-	10
	Power	2004	-	8
	Traditional energy	2009	-	6
Public, governance, and social services	E-government	-	-	11
	Emergency response	2005	-	4
	Finance	2005	-	13
	Public safety	2009	-	9
	Public services	2013	-	6
	Service industry	2010	2020	8
Heavy and strategic industry	Automotive industry	2004	-	14
	Equipment manufacturing	-	-	15
	Next-generation manufacturing	-	-	15
	Raw materials and heavy industry	-	-	14
	Transportation	-	-	11
Emerging fields	Biotechnology	2008	2020	10
	E-commerce	2005	-	6
	Information technology	-	-	14
	Information security	-	-	14
	Logistics	-	-	15
	Nanotechnology	-	2019	7
	National information resources	-	-	13
	New materials	2004	-	12
	Space, satellites, and geospatial	-	-	11

Figure 16. Jiangkai II (Type 054A) Frigate



Source: Cropped version of photograph from Chinese Military Review, “Type 054A (Jiangkai II class) FFG-546 Yancheng Guided Missile Frigate in Mediterranean,” undated (but with a URL suggesting that it was posted in February of 2014), accessed August 29, 2018.



Figure 15. *Luyang III* (Type 052D) Destroyer



Source: Cropped version of photograph accompanying “Type 052D Luyang-III Class,” SinoDefence.com, September 3, 2017, accessed August 28, 2019.



Figure 14. Renhai (Type 055) Cruiser (or Large Destroyer)



Source: Photograph accompanying Peter Suci, “Chinese Navy to Launch 8th New Type 055 ‘Stealth’ Destroyer,” *National Interest*, August 22, 2020. The article credits the photograph to “Chinese Internet.”

Figure 18. Yuzhao (Type 071) Amphibious Ship



Source: Cropped version of photograph from Chinese Military Review, “Jinggang Shan (999) Type 071 YUZHAO Class Amphibious Transport Dock,” undated (but with a URL suggesting that it was posted in February 2012), accessed August 29, 2018.

Figure 19. Type 075 Amphibious Assault Ship



Source: Photograph accompanying David Axe, “China Is Finishing Its First Large Helicopter Assault Ship,” *National Interest*, October 29, 2019.



Figure 10. *Shandong* (Type 002) Aircraft Carrier



Source: Cropped version of photograph accompanying Daniel Brown, “China’s Newest Aircraft Carrier Is Actually Very Outdated—But Its Next One Should Worry the US Navy A Lot,” *Business Insider*, July 18, 2018. The article credits the photograph to Reuters.



Figure 12. J-15 Flying Shark Carrier-Capable Fighter



Source: Photograph accompanying “China Developing Elite New Variants of the J-15 Flying Shark to Deploy from EMALS Equipped Future Carriers; Implications for the Balance of Power at Sea,” *Military Watch Magazine*, August 17, 2018, accessed August 28, 2019.



J-20





FC-31 or J-31/35





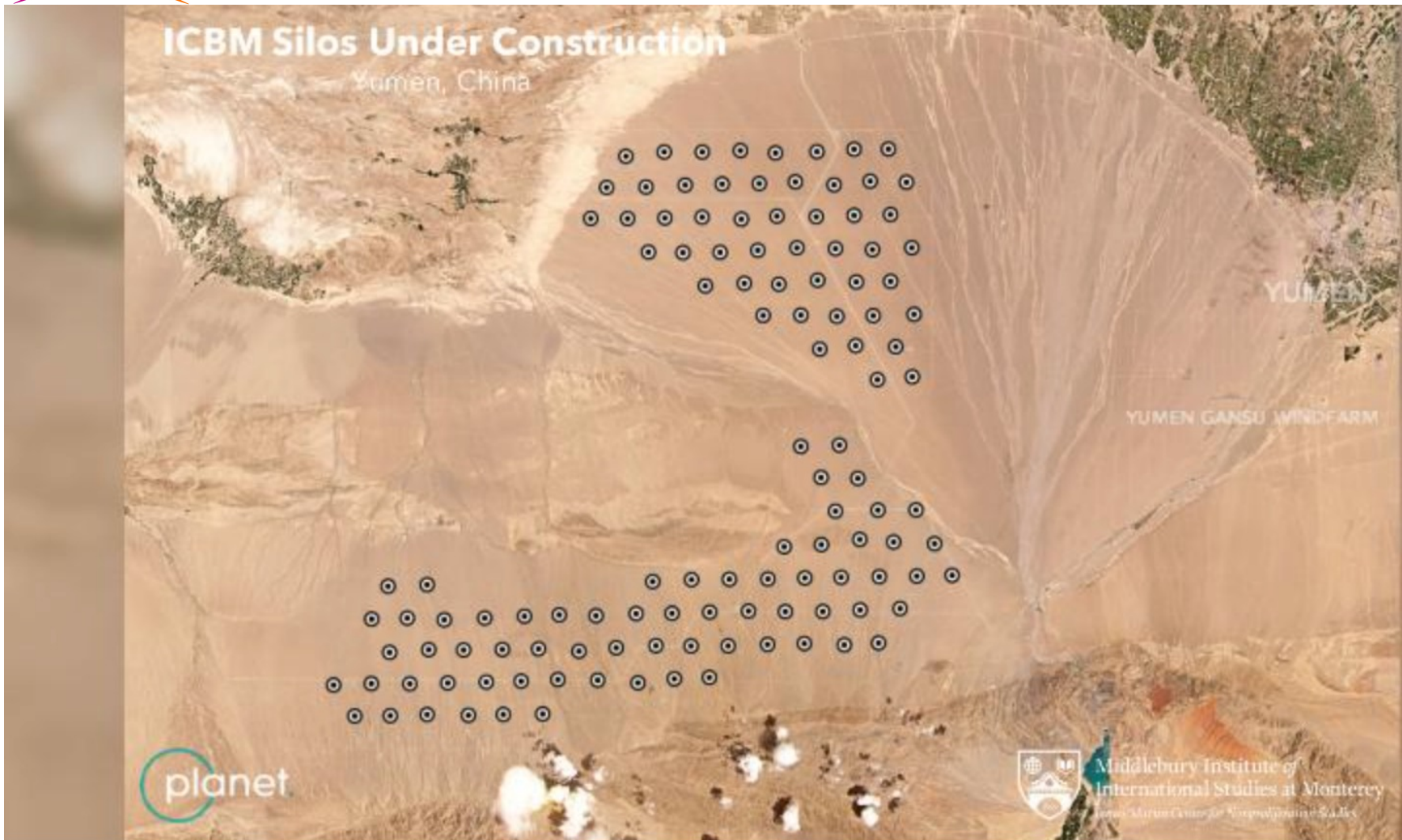
China's UAV Development



PHOTO COURTESY OF, LTD.



ICBM Missile Silos



The purported locations of new Chinese ballistic missile silos are represented by dots in this annotated version of an image from commercial satellite company Planet Labs Inc.



Figure 1. DF-21D Anti-Ship Ballistic Missile (ASBM)



Source: Cropped version of photograph accompanying Andrew S. Erickson, “China’s DF-21D Anti-Ship Ballistic Missile (ASBM)—Officially Revealed at 3 September Parade—Complete Open Source Research Compendium,” AndrewErickson.com, September 10, 2015, accessed August 28, 2019.

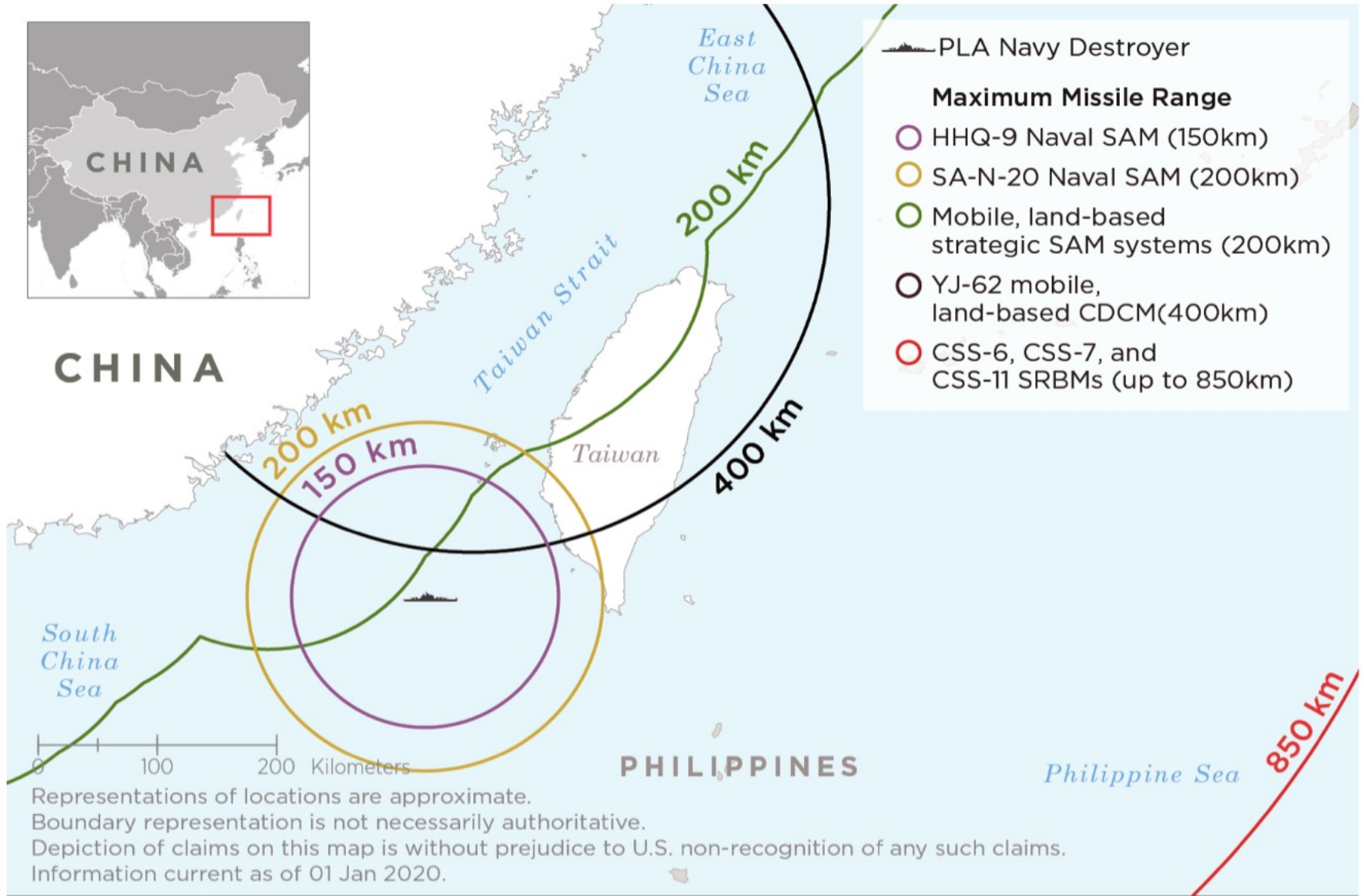


Figure 2. DF-26 Multi-Role Intermediate-Range Ballistic Missile (IRBM)



Source: Cropped version of photograph accompanying Missile Defense Project, “Dong Feng-26 (DF-26),” Missile Threat, Center for Strategic and International Studies, January 8, 2018, last modified January 15, 2019, accessed August 28, 2019.

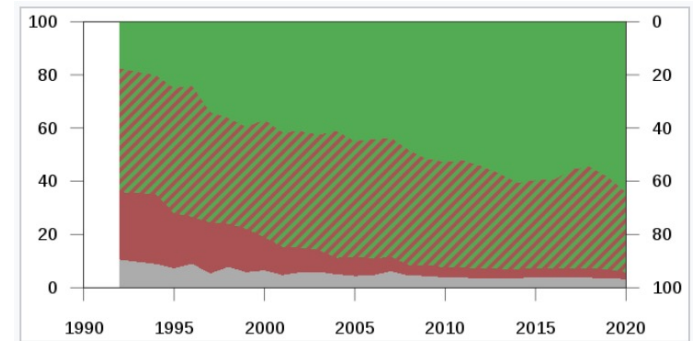
Taiwan Strait





Why Taiwan Matters

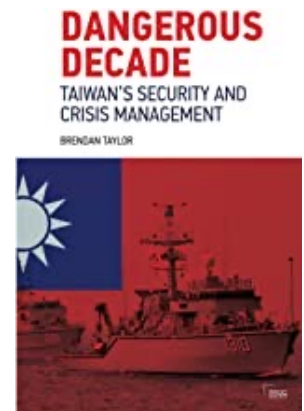
- **Highly functioning Democracy – representative of the possibilities**
- **Has operated independently since 1949 Chinese Civil War**
- **23 Million Population**
- **Culturally considered Taiwanese vs. Chinese**
- **\$600B GDP**
- **Home of very high-tech industries**
- **S.O.T.A. Semiconductor Fabrication**
- **U.S. 10th largest trading partner (\$85B)**
- **Strategic Geography – vital to trade flows**
 - First Island Chain “Anchor”
- **1980 Taiwan Relations Act**
- **U.S. Policy of “Strategic Ambiguity”**
- **Japan stepping up to protect Taiwan**



Results from an identity survey conducted each year since 1992 by the Election Study Center, [National Chengchi University](#).^[226] Responses are Taiwanese (green), Chinese (red) or Both Taiwanese and Chinese (hatched). Non-responses are shown as grey.



Tsai Ing-wen, President of the Republic of China





China's Conventional and Nuclear Strike Range

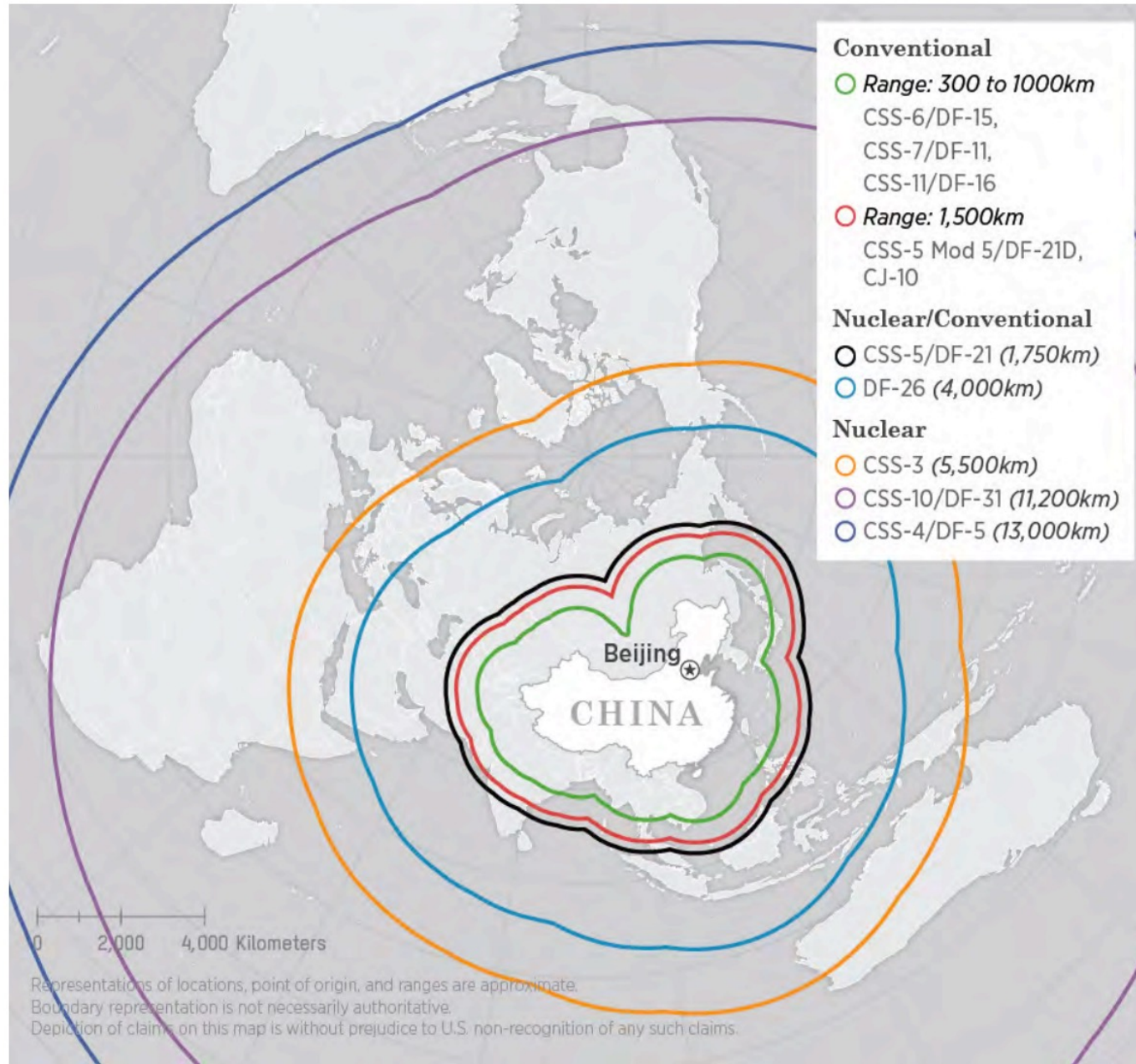
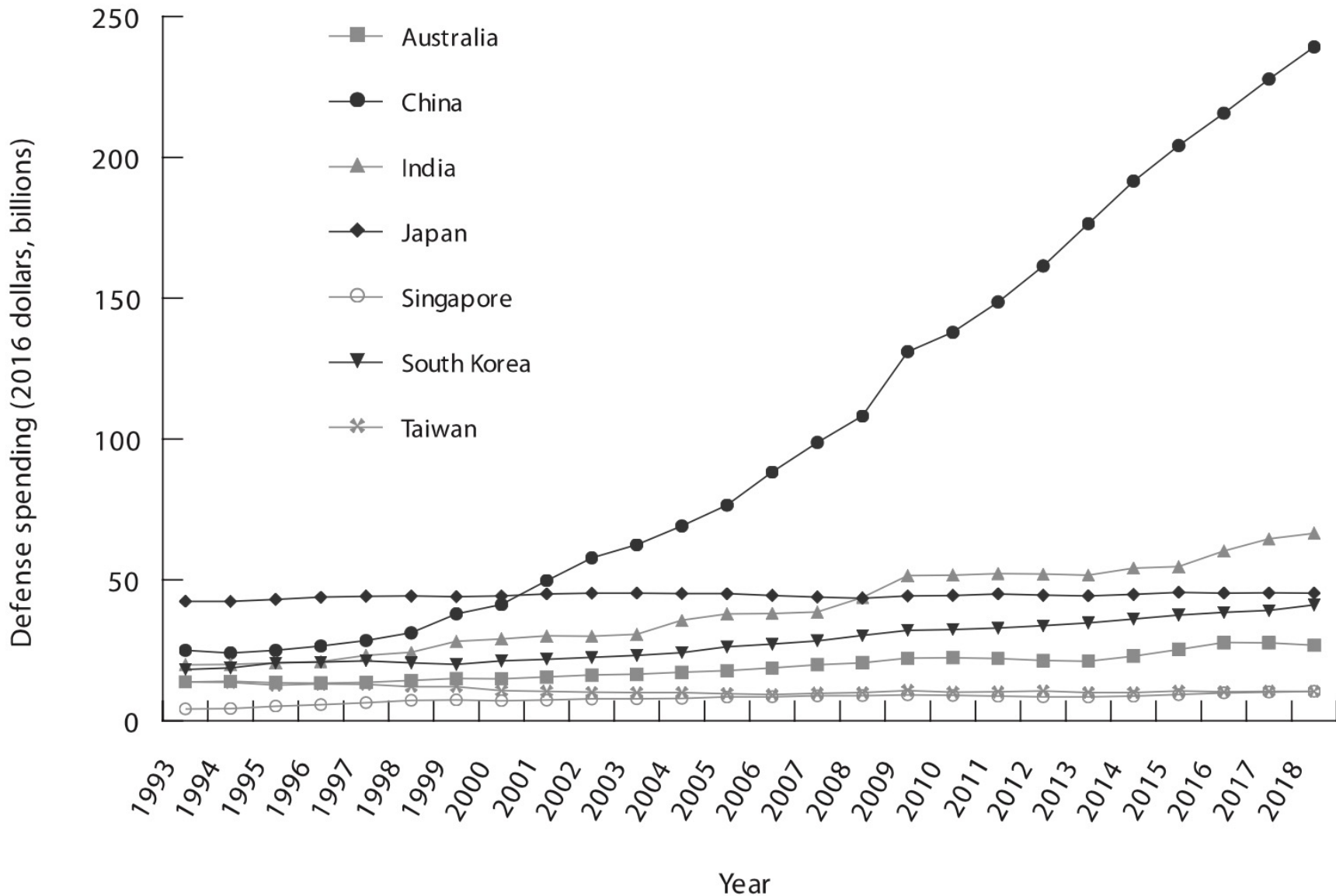


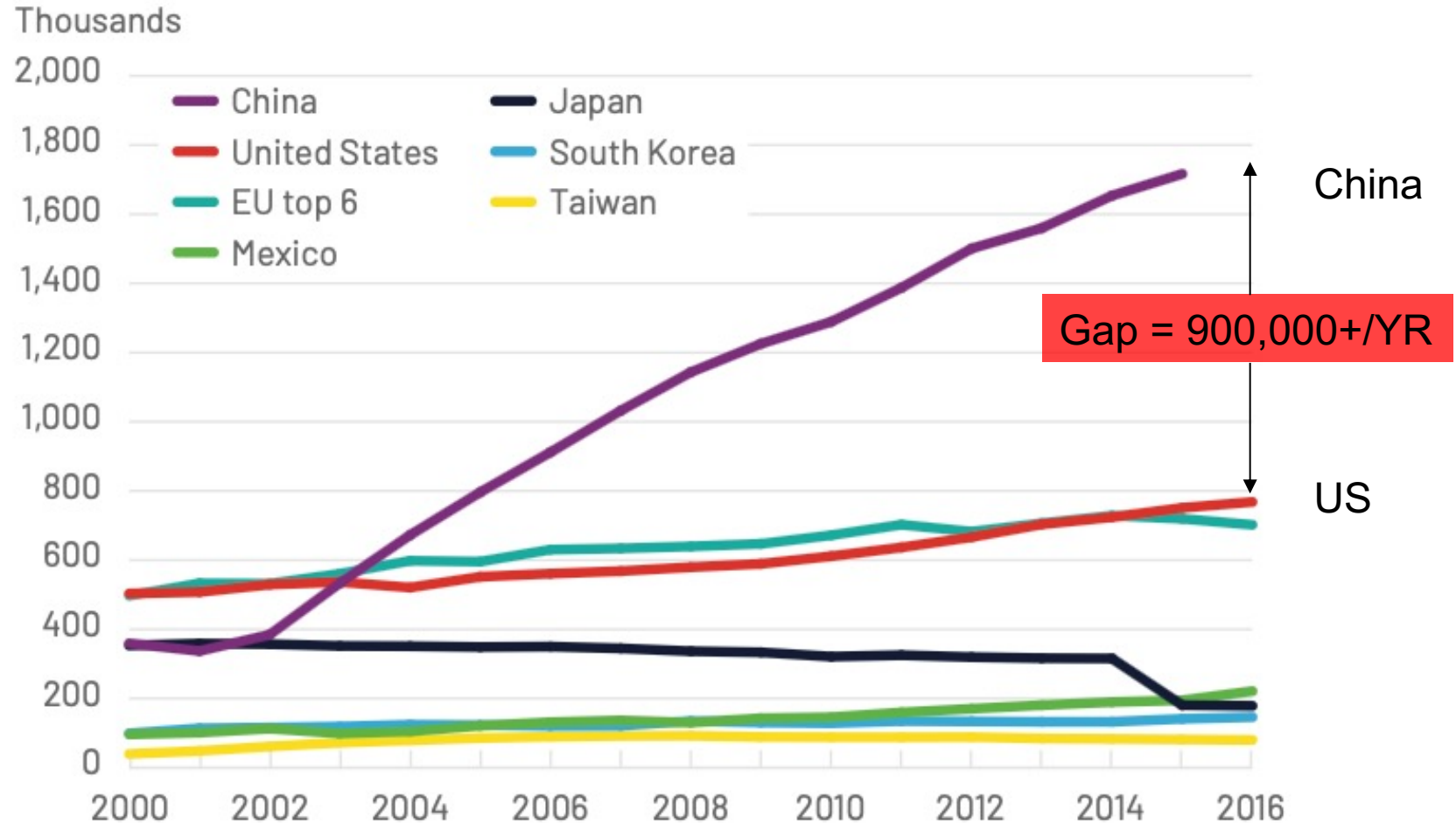
FIGURE 10 Top seven defense spenders among Indo-Pacific countries (1993–2018)





First University Degrees in S&E

Figure 3. First university degrees in S&E, by selected region, country, or economy: 2000-16



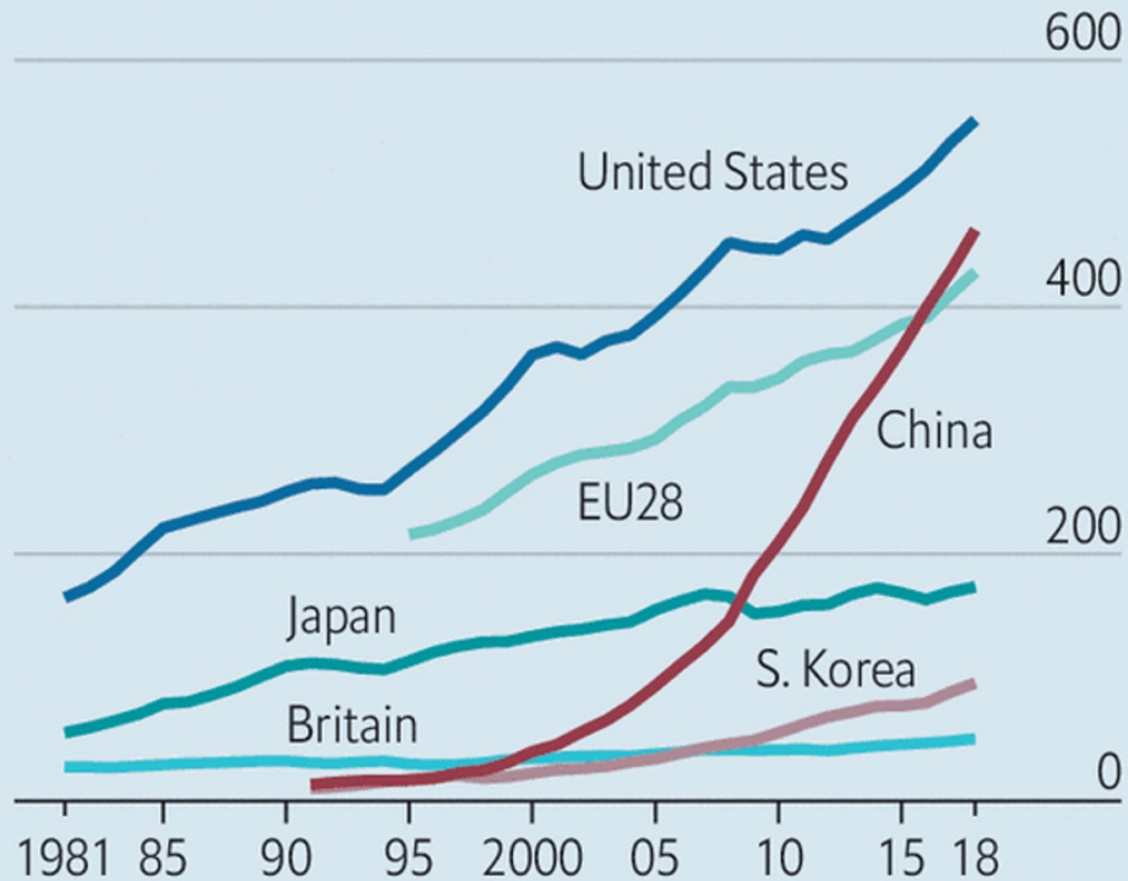


R&D Spending (Feedstock for Innovation)

Refusing to stay in its lane

4

Research and development spending*, \$bn



Source: OECD

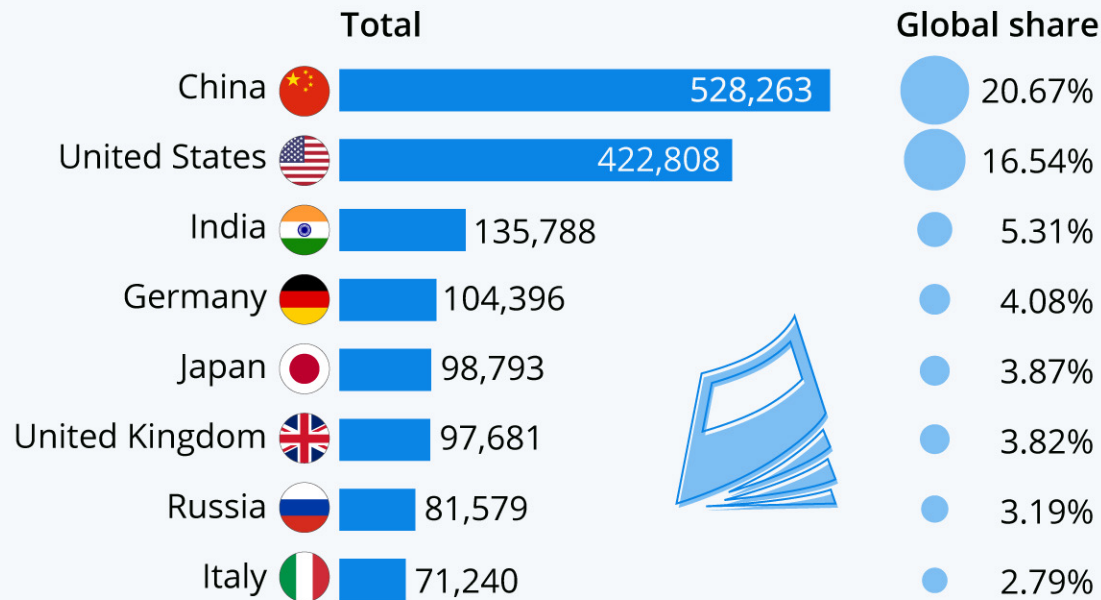
*Public- and private-sector



Global R&D Productivity

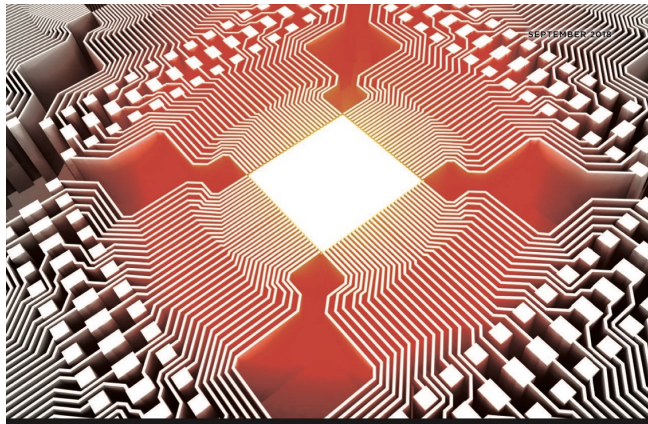
The Countries Leading The World In Scientific Publications

Number of science & engineering articles published in peer-reviewed journals in 2018



Source: National Science Foundation





QUANTUM HEGEMONY?

China's Ambitions and the Challenge
to U.S. Innovation Leadership

Elsa B. Kania & John K. Costello



Xi Jinping visited the University of Science and Technology of China in April 2016, and he is pictured here standing next to Pan Jianwei, China's most prominent quantum scientist. Xi's personal attention to quantum technologies is a strong indicator of the high-level importance of this domain. (Xinhua/Li Xueren)

Against the backdrop of a broader campaign to enhance national cyber security, Chinese leaders seem to hope that shifting sensitive information and communications to quantum networks could allow the “shield” of quantum cryptography to mitigate vulnerability to adversary cyber espionage and signals intelligence capabilities.



China's Advances in Quantum Technologies

“Scientists are beginning to control the quantum world; this will greatly promote the development of information, energy, and materials sciences, bringing about a new industrial revolution.”¹³⁷

—Xi Jinping, General Secretary, Chinese Communist Party and President, People’s Republic of China



What Does it all Mean?



**Future
Trends**



CCP?

Global Rules-based Liberal Order?



Summary

- Rapidly worsening global relationships and perceptions – growing push-back
- CCP's actions and behaviors undermine trust and credibility in the PRC
 - w/o trust there is not much left.
- The convergence of strategic trends adds significant global risk and uncertainty
 - Influence through strong partnerships and coalitions really matter
- CCP Authoritarianism/Dictatorship lacks checks and balances
 - Without democracy sustaining CCP internal legitimacy will be a challenge
 - Without human rights sustaining CCP external legitimacy will remain a challenge
- The “China Dream” and “One China” Policy drive Nationalism
 - Clear “Red Lines” impede peaceful progress
 - U.S. “Strategic Ambiguity” walks a narrow line
 - Taiwan Relations Act designed to ensure Taiwan self-defense and peaceful territorial resolution
- China's aggressive tactics and advanced weapons are designed to intimidate
 - U.S. Freedom of Navigation (FON) Exercises designed to show resolve and stabilize ASEAN maritime trade

*There is a real “**Sense of Urgency**” re. the need for innovation, technology, collective brainpower and astute leadership to deter China's aggression and sustain the liberal, rules-based global order*



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World Order

Global Relations, Rules and Institutions

- **Working Definition:**

- The concept held by a region or civilization about the nature of just arrangements and the distribution of power thought to be applicable to the entire world, resting on a set of commonly accepted rules that define the limits of permissible action and a balance of power that enforces restraint where rules break down, preventing one political unit from subjugating all others.” (Henry Kissinger)

- **Elements include:**

- Constitutive Norms
- Scope and Depth
- Operating Principles
- Specific Regimes, Institutions and Organizations

- **Future World Order Objectives (suggested):**

- Preserving Conditions for Sustained Human Existence
- Minimizing Risk of War
- Managing the Movement of Goods, Capital, Information and People
- Respecting Human Rights